

Chart of Accounts Maintenance

Student Guide

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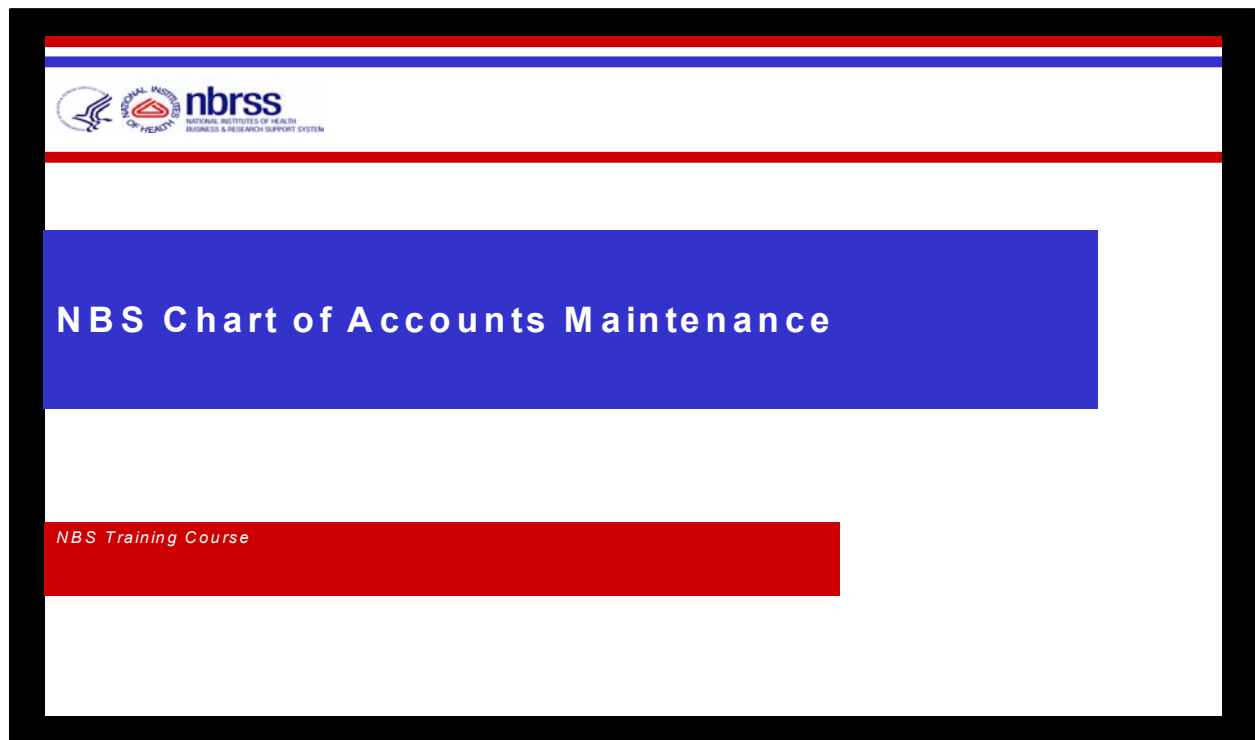
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Overview

Chapter 1

NBS Chart of Accounts Maintenance



Course Outline

**Course Outline**

- This course will be presented in the following format:
 - Review Course Objectives
 - Chart of Accounts Theory
 - Chart of Accounts Overview
 - ACS Values
 - Account Requests
 - Getting Started with the NBS
 - Establishing a New Project Request
 - Deactivating a Project
 - Working with the Status Log
 - Submitting Pending Requests
 - Notifications
 - Course Summary

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Course Objectives



Course Objectives

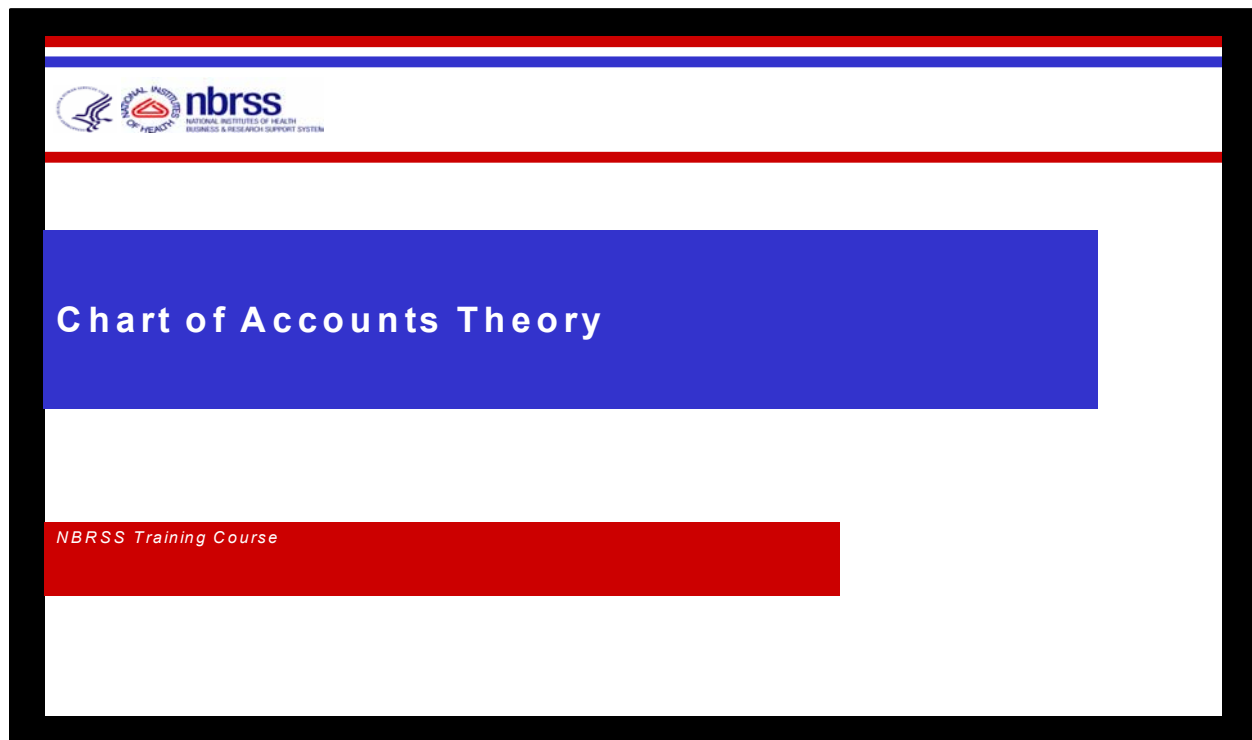
- To provide a greater understanding of the NIH Chart of Accounts
- To present the tasks that must be completed to maintain the NIH Chart of Accounts and set up budgetary accounts
- To provide instructions and hands-on exercises on setting up new projects, requesting new Cost Centers and inactivating projects within the NBS

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Chart of Accounts Theory

Chapter 2

Chart of Accounts Theory



Lesson Objectives

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Lesson Objectives

- Chart of Accounts Overview
- ACS Values

Page 1

Chart of Accounts Overview


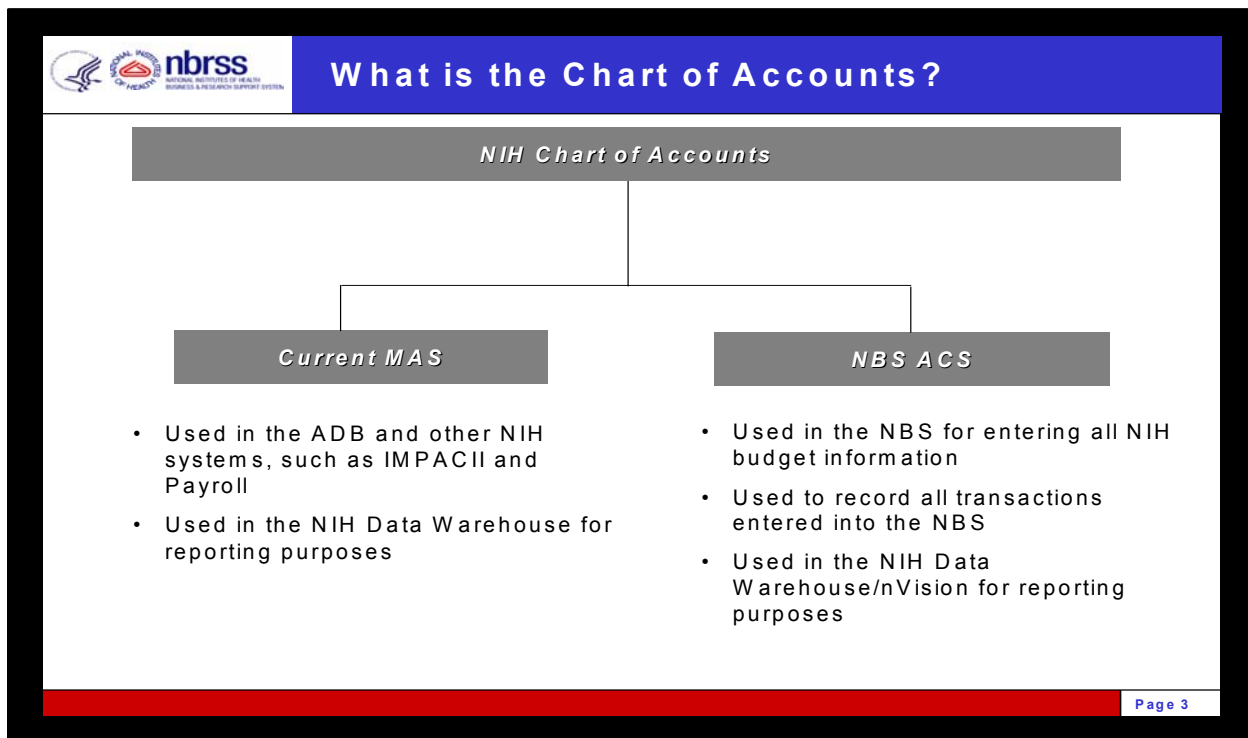
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Chart of Accounts Overview

- Chart of Accounts Overview
 - ACS Values


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What is the Chart of Accounts?



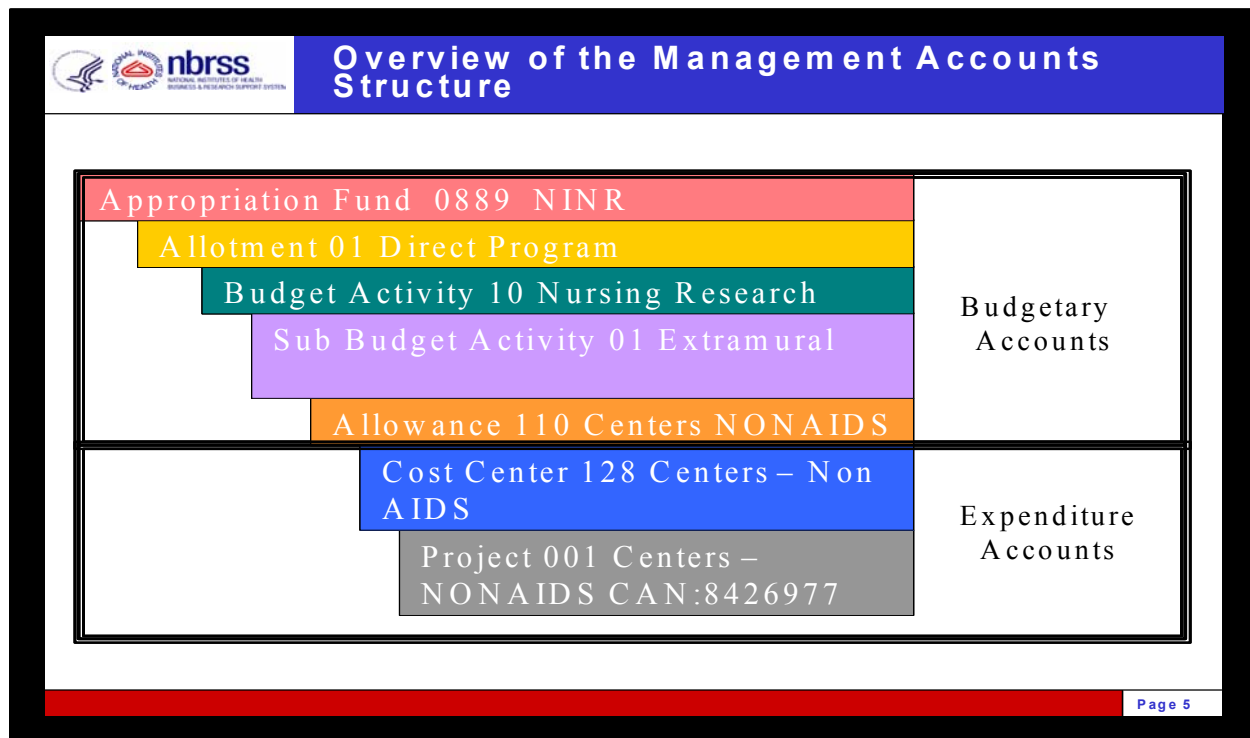
- An organization's Chart of Accounts (CoA) is the framework used by financial accountants and management analysts to budget, record and report on all financial transactions and account balances.
- The current CoA used at the NIH is the Management Accounts Structure (MAS). This structure is based on the Common Accounting Number or CAN.
- The MAS is replaced with the new Accounting Classification Structure (ACS) in the NBS.
- Because most existing NIH systems will be using CANs to process transactions for the next several years, both Charts of Accounts must be maintained until these systems transition to the ACS.

Overview of the Management Accounts Structure

		Overview of the Management Accounts Structure	
Project CAN		PMS Indicator	
		IMN	
		Allotment	
		Allowance	
		Budget Activity	
		Sub Budget Activity	
		Mechanism Ind	
		Direct/Reimbursable	
		Payroll Ind	
		Cost Center	
		Project	
		Location	
		APPROP	
		Acronym	
		Installation Location	
		FARS	
		Accounting Point	
		ORG SAC	
		EIS	
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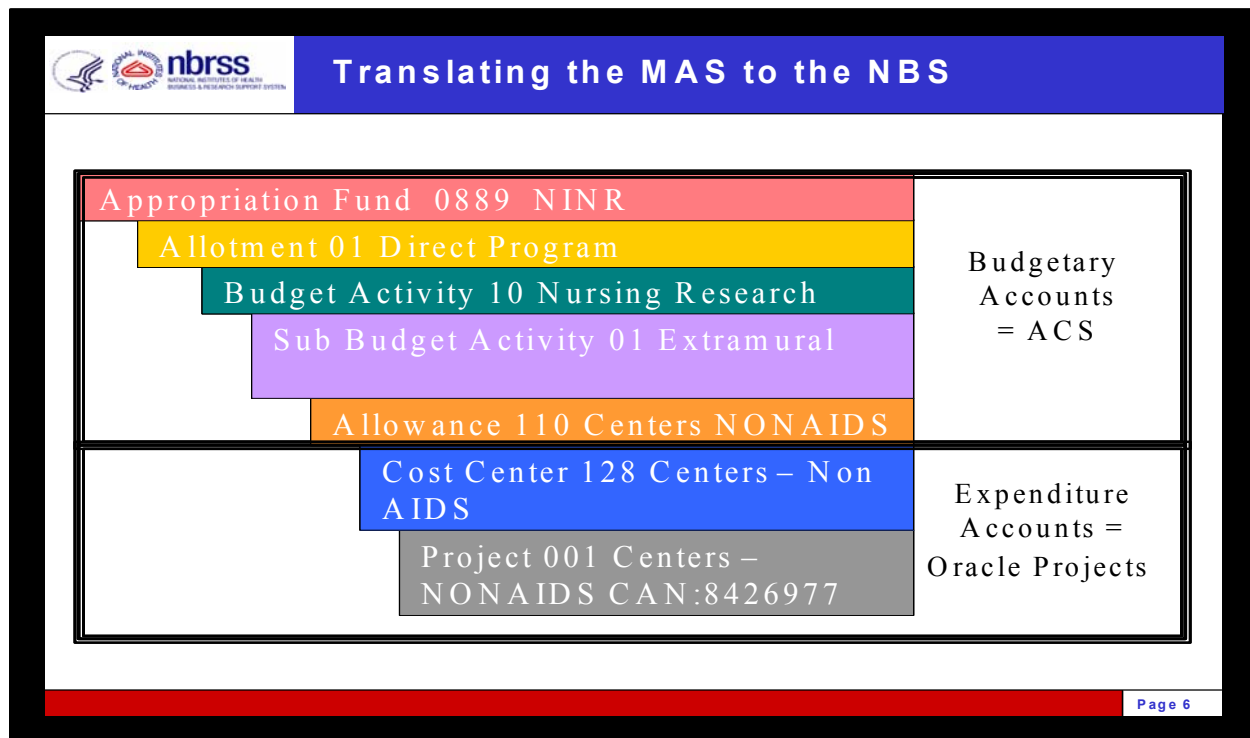
- The MAS is a table of many elements associated with the seven-digit CAN.
- The CAN is a short cut that represents elements from the entire explosion.
- Financial transactions are recorded and reported by the CAN, which means that most users are not familiar with the explosion elements.
- Note the explosion does not include SGL, Object Class or Fiscal Year information.

Overview of the Management Accounts Structure




- The MAS elements are arranged hierarchically, from Appropriation down to the Project CAN. CANs summarize the Appropriation, Allotment, Allowance, Cost Center and Project levels.
- The MAS incorporates two different types of accounts into a single structure:
 - **Budgetary Accounts** are used for funds control and Departmental reporting
 - **Expenditure Accounts** are the lower-level accounts that NIH uses internally to track obligations and spending at a more detailed level

Translating the MAS to the NBS



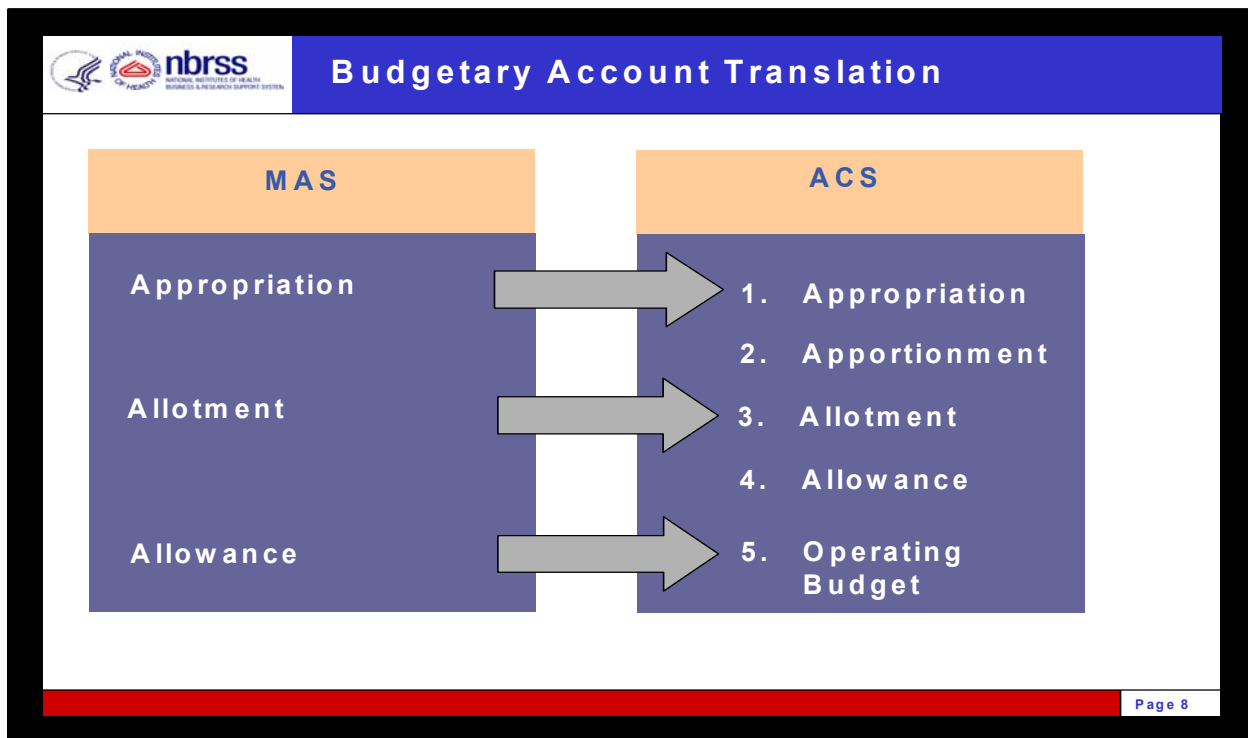
- The accounts in the MAS are represented by two separate constructs in the NBS:
 - **Budgetary Accounts** – The Accounting Classification Structure (ACS) identifies budgetary accounts down to the MAS Allowance level. The ACS resides in the NBS General Ledger.
 - **Expenditure Accounts** – Oracle Projects is a separate NBS module that is interpreting and collecting the detailed spending accounts at the Cost Center and Project CAN level for data warehouse use.
- **The separation of these two types of accounts is a conceptual shift for the NIH Budget community.**

Overview of the Accounting Classification Structure

<div>  nbrss <small>NATIONAL BIODIVERSITY RESEARCH SUPPORT SYSTEM</small> </div> <div> Overview of the Accounting Classification Structure </div>									
<small>DRAFT LAST UPDATED: 07/15/02</small>									
NIH Chart of Accounts Segments <small>DRAFT FOR CRP1 JUNE 2002</small>	Information contained: Reflects March 29 UPMS Strawman	Fund Control & Budget Distribution Levels					Sample	Length	HHS Control of Value Set
		Appropriation	Apportionment	Allotment	Advance	Operating Budget			
Fund	OPDIV, IMN #, fiscal year start, # of years available- year of apportionment.	X	X	X	X	X	8800000011RAU = NIH Major Fund 2001 Single Yr Reimbursable Category A.	14	all values
Budget FY	The year of apportionment. Shows which year of a multi or no year fund	X	X	X	X	X	2001	4	all values
NIH Fund Limit	Fund restrictions (limitations) from law or reg such as Small Business			X	X	X	01=General	2	
NIH Allot Org	NIH IC or Central Service to whom allotment is issued			X	X	X	HHS-OD	4	
Organization	IC-Division-Branch-Section to whom operating budget is issued --					X	Parent: 18WAM Labat/PRAM NIH OD OM Child:18WAM000000C	11	parents YES
Reporting Attrib: DIV Access Org	a reporting attribute on the Organization segment to support the Internal/External benefit to NIH							[8]	
NIH IE	Establishes uniform level for NIH				X	X	Internal	1	
Budget Activity/Prgm	Budget Activity and sub budget codes are combined into single series of codes and then aligned to FARS.					X	00434 = OD RMS	5	parents YES
Reporting attrib: FARS	Identifies programs for the Catalog of Federal Domestic Assistance						999 = null	[5]	all values
NIH Mech	NIH Mechanism table categories plus optional level of IC detail on					X	991 = Off Mechanism	3	YES
Line Item (formerly Costing)	4 PURPOSES: 1. B&F for Congressional Reporting on facilities. 2. During transition to align Oracle Purpose to 1 character mechanism. 3. For Object Class codes standardized to DHHS plus 2 characters for local					X	9999 = null	4	
Object Class	US Standard General Ledger plus						2555=Research and Development Contracts	7	parents YES
SGL Account	US Standard General Ledger plus						610001=Operating Expenses	6	all values YES
Cohort	Guaranteed Loan programs require this field. Not currently used in NIH						9999=null	4	
HHS future 1							9999=null	4	all values
NIH future 1							9999=null	4	
reporting attrib: GPRA								[7]	TBD
String Length								58	

- The ACS is composed of fourteen independent segments, each of which represents a key reporting indicator for financial and budgetary information.
- Budgetary accounts (Appropriations, Allotments, etc.) are created by combining segment values, rather than being hard-coded into a hierarchy as is done in the MAS.

Budgetary Account Translation



- The ACS is structured to identify the same budgetary accounts that are reflected in the MAS and used for funds control:
 - Appropriations and Allotments represent the same budgetary levels in both the ACS and the MAS
 - The Apportionment is an additional budgetary account in the ACS – apportionments accounts did not exist in the MAS
 - The Allowance in the ACS defines a new budgetary account that represents the break between internal and external funds
 - The Operating Budget in the ACS is equal to the MAS Allowance

Sample Budgetary Account Comparison



Sample Budgetary Account Comparison

- In the MAS, Accounts are identified by walking down the hierarchy:

Appropriation = 0843 National Institute of Aging

Allotment = 01 Direct Program

Allowance = 102 Biology of Aging

- Additional reporting elements, such as Direct/Reimbursable are defined as attributes associated with each level in the hierarchy

Sample Budgetary Account Comparison

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Sample Budgetary Account Comparison


In the ACS, Accounts are identified by combining segment values. The Appropriation and Apportionment are identified by combining the first two segments.

Appropriation = 0843 National Institute of Aging
is translated into:

Fund	Budget FY	Fund Limit	Allot Org	I/E	Org	Budget Activity	Mech	Line Item
08024320031DA0 NIA Annual Direct Appropriation	2003 Apportioned in FY 2003							

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Sample Budgetary Account Comparison

**Sample Budgetary Account Comparison**

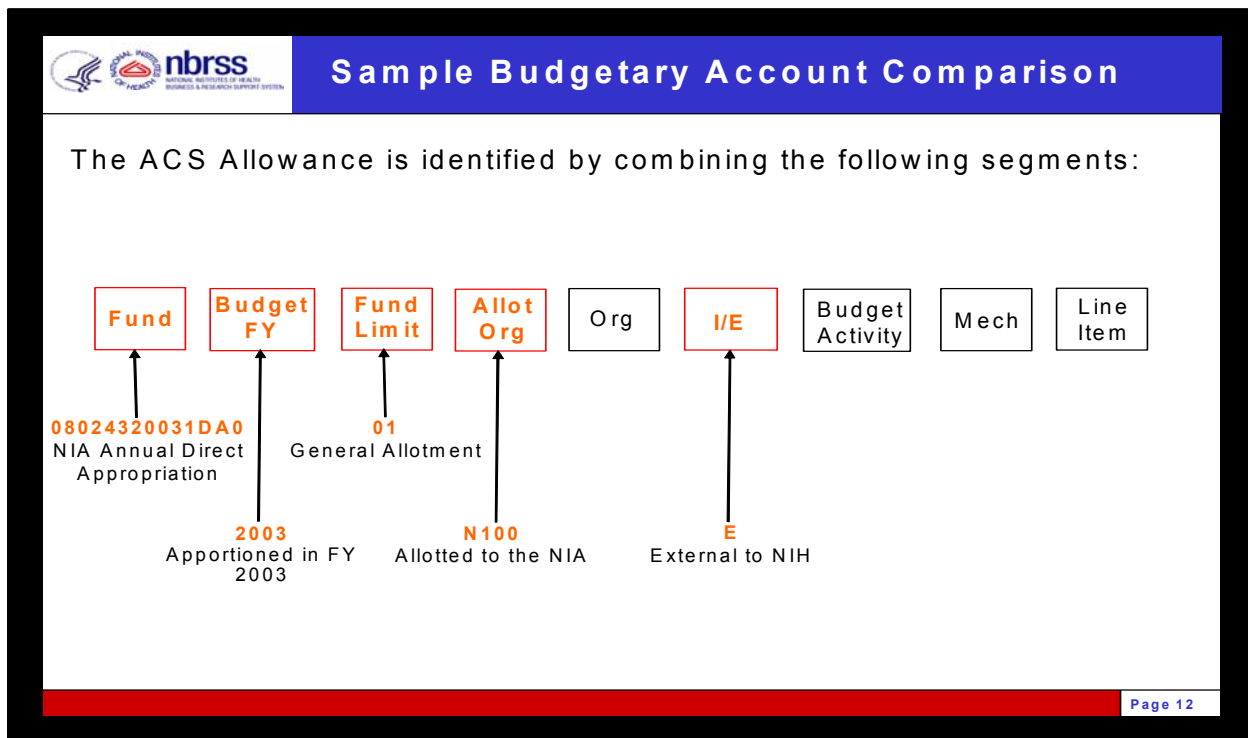
The Allotment is identified by combining the first four segments.

Appropriation = 0843 National Institute of Aging
Allotment = 01 Direct Program
is translated into:

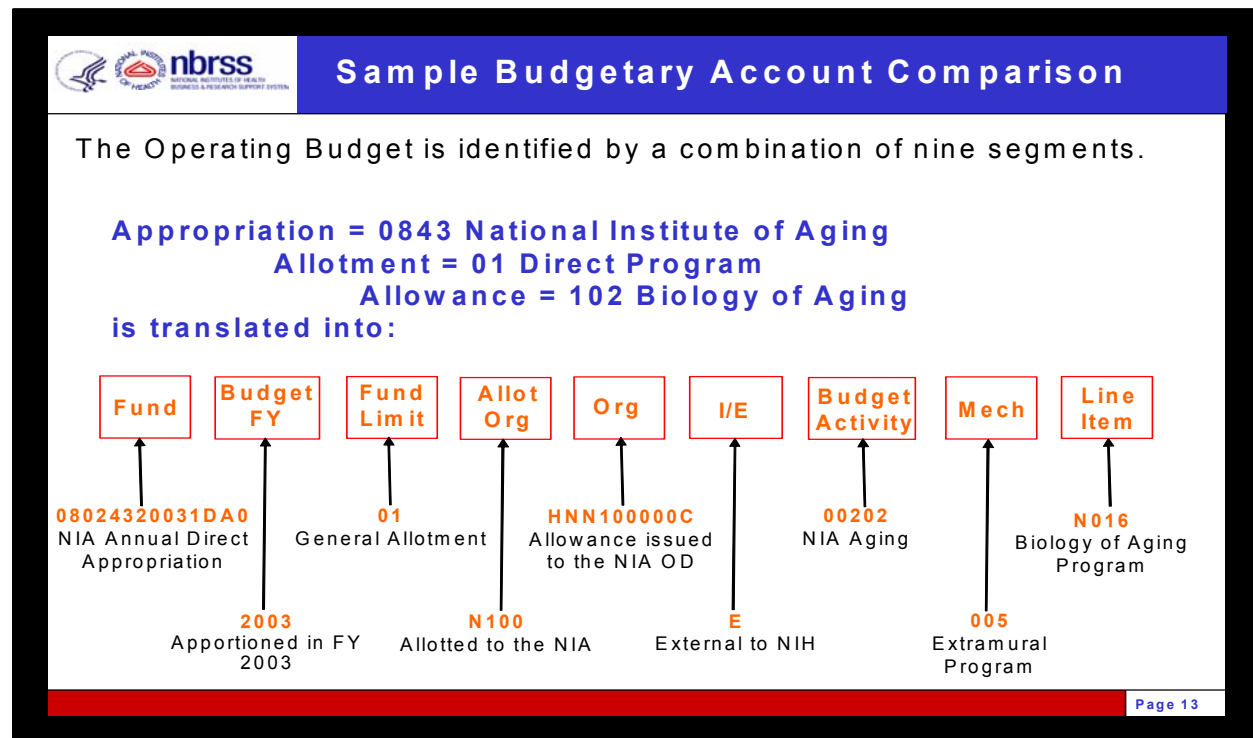
Fund	Budget FY	Fund Limit	Allot Org	Org	I/E	Budget Activity	Mech	Line Item
08024320031DA0 NIA Annual Direct Appropriation	2003 Apportioned in FY 2003	01 General Allotment	N100 Allotted to the NIA					

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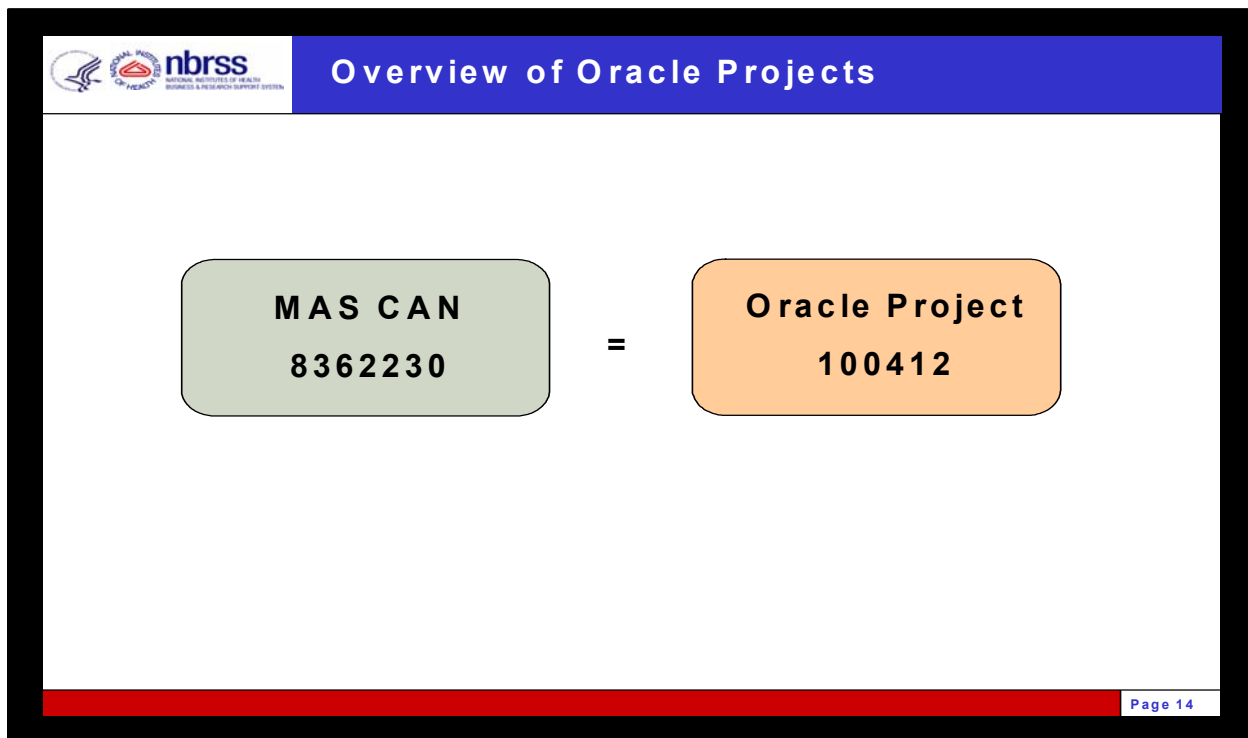
Sample Budgetary Account Comparison



Sample Budgetary Account Comparison

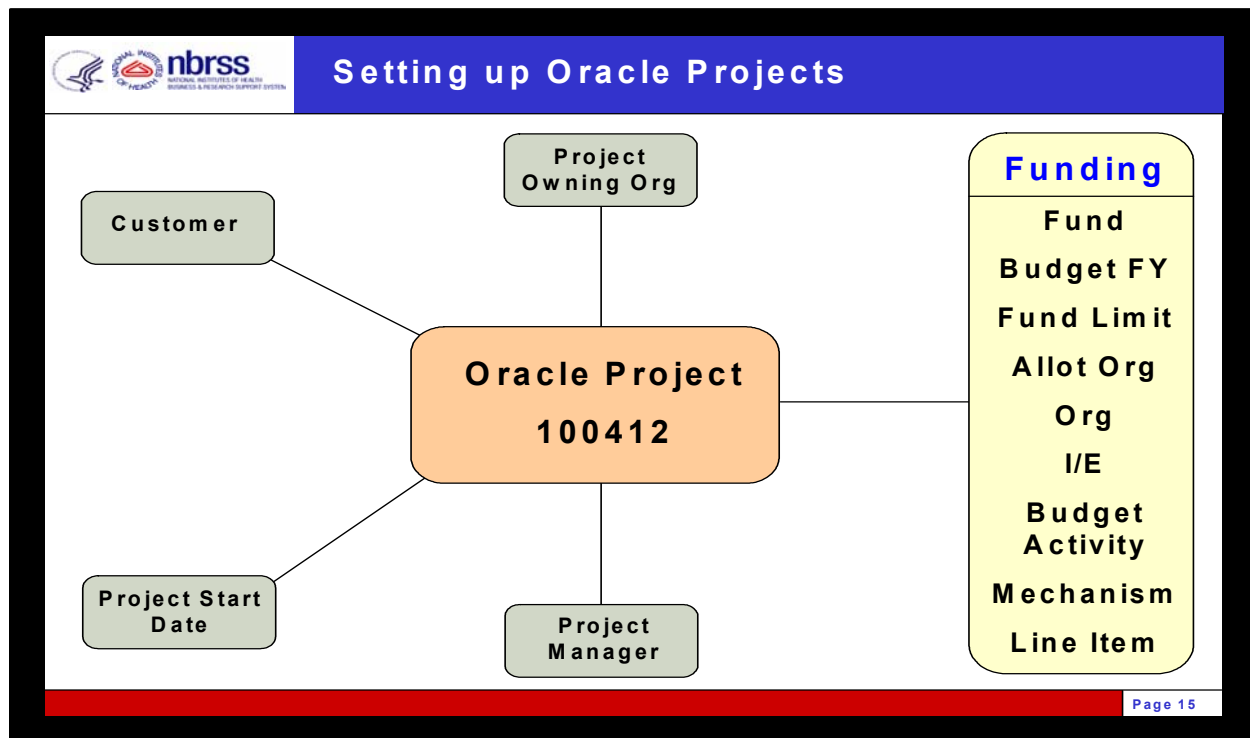


Overview of Oracle Projects




- There is a one-to-one relationship between Project CANs in the MAS and Oracle Projects
- Projects enable organizations to track NBS expenditures in the Data Warehouse to the same degree of detail as the CAN
- Each Project is associated with the ACS segment values that define the related Operating Budget account

Setting up Oracle Projects



- When you set up an Oracle Project, you must assign additional descriptive attributes to your projects, including:
 - Project Owning Organization – the organization fiscally responsible for expenditures on the Project. This can be the same as the organization responsible for funds control, but it does not have to be the same.
 - Project Manager – the person who has fiscal responsibility for the Project
 - Customer (if the Project is reimbursable)
 - Start Date
- You must also identify the ACS values that make up the Operating Budget (MAS Allowance) associated with the Project. The Operating Budget values define the “parent” account for the project.

ACS Values

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ACS Values

- Chart of Accounts Overview
 - ACS Values

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ACS Segment Values




ACS Segment Values

- Segments define functional data elements that are coded within the ACS.
- Each segment in the ACS creates an independent dimension of information, compared to the MAS which has one dimension (the CAN), and a larger, hidden data explosion.
- The ACS consists of the following segments:

1. Fund	8. NIH Mechanism
2. Budget Fiscal Year	9. Line Item
3. NIH Fund Limit	10. Object Class
4. NIH Allotment Org	11. SGL Account
5. Organization	12. Cohort
6. NIH I/E	13. HHS Future Use
7. Budget Activity/Program	14. NIH Future Use
- Levels 1-9 define budgeting levels
- Levels 10-11 are added at time of expenditure on a Project
- Levels 12-14 are for future expansion

ACS Segment Values



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ACS Segment Values

ACS segment values are combined to form an ACS string that defines a unique account in the NBS. The following eleven segments combine to form accounts:

	S2 Budget FY	S4 Allotment Org		S6 I/E	S8 Mechanism		S10 Object Class	
	↓	↓		↓	↓		↓	
08024620031DA0.	2003	01.	A100.	HNA1000000C	I.	00142.	511.	A500.
								2651.
								610001.
↑	↑	↑	↑	↑	↑	↑	↑	↑
S1 Fund	S3 Fund Limit		S5 Organization	S7 Budget Activity	S9 Line Item		S11 SGL	

Note: There are three additional segments that are not currently being used by NIH. These segments will have "9999" as a default value.

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Segment 1: The Fund Segment



Segment 1: The Fund Segment

Definition

The Fund segment controls the major functions of reporting to OMB and Treasury and defines the funds control levels for budgeting.

Components of the Fund Segment:

	Sample Value:
2 character identifier for the OPDIV	08
4 character Internal Machine Number (IMN)	0246
4 character Appropriation Fiscal Year	2003
1 character for number of yrs appropriation is active (0 = no year, 1 = annual, 2-9 = multi year)	1
1 character for Direct or Reimbursable	D
1 character to equal category A or B monies	A
1 character placeholder for the future	0

OFM will set up new fund segments for all NIH funds at the beginning of each fiscal year.

08024620031DA0.	2003	01.	A100.	HNA1000000C	1.	00142.	511.	A500.	2651.	610001.
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Segment 2: The Budget FY Segment



Segment 2: The Budget FY Segment

Definition

- The Budget FY segment value identifies the fiscal year of apportionment for the transaction.
 - For annual and no year funds, this will be the current fiscal year of operations and the same as the fund year.
 - Multi year funds will have different Budget FY and Fund Years after the initial year to indicate which year of the multi year fund is being cited.
 - The Budget FY is a 4 character segment.

Setting up the Budget FY Segment:

Each Year:

- OFM will add each new fiscal year and disable the canceling fiscal year, (6 years before the current fiscal year)

08024620031DA0.	2003	01.	A100.	HNA1000000C	1.	00142.	511.	A500.	2651.	610001.
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Segment 3: The Fund Limit Segment



Segment 3: The Fund Limit Segment

Definition

- Allotments are defined within each Fund by the values in Fund Limit and Allotment Org.
- The Fund Limit Segment is used to further define the allotment when needed to identify funds for special laws or programs.

Sample Values

01	General
03	Small Business
05	Royalty
12	Diabetes

08024620031DA0.	2003	01.	A100.	HNA1000000C	1.	00142.	511.	A500.	2651.	610001.
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Segment 4: The Allotment Org Segment



Segment 4: The Allotment Org Segment

Definition

- Allotments are defined within each Fund by the values in Fund Limit and Allotment Org.
- The Allotment Org identifies the IC to whom an allotment is issued (MF and SSF are allotted to the OD, not the individual centers).

Setting up the Allotment Org Segment

- Occurs when a new IC is established
- The value of this segment is the third character of the IC's SAC + 100
- Allotments are currently to the IC Director.

08024620031DA0.	2003	01.	A100.	HNA1000000C	I.	00142.	511.	A500.	2651.	610001.
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Segment 5: The Organization Segment



Segment 5: The Organization Segment

Definition

- This segment represents the organizational unit within NIH to whom the operating budget is issued.
- DHHS requires financial systems to align with HR systems using Standard Administrative Codes (SACs). This means that allowances and operating budgets are issued to a particular office.

Setting up the Organization Segment

- Occurs rarely and would be at the request of the IC Budget Office
- Changes here indicate an IC is establishing new responsible officials for funds control
- The values requested by the IC must be SACs in the NIH HRDB.
- Every postable account has a format of the HRDB SAC plus zeroes to fill to the tenth character and the letter C
- A list of existing SACs is available on the NIH website for the NIH Office of Management Assessment:
<http://oma.od.nih.gov/ms/organization/function/index.html>

08024620031DA0.	2003	01.	A100.	HNA100000C	I.	00142.	511.	A500.	2651.	610001.
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Segment 6: The Internal/External (IE) Segment



Segment 6: The Internal/External (IE) Segment

Definition

- The I/E Segment indicates whether the use of funds is internal by NIH or external by the research community.
- This segment will be used to create up to two allowances per fund, each subject to hard funds control.
- Use of this segment provides NIH with a way to fulfill the DHHS requirement of hard funds control at an allowance level on a consistent basis across all ICs.

Setting up the IE Segment

- This segment list of values should not change without a major policy level decision throughout the NIH Finance and Budget communities.

08024620031DA0.	2003	01.	A100.	HNA1000000C	I.	00142.	511.	A500.	2651.	610001.
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Segment 7: The Budget Activity Segment



Segment 7: The Budget Activity Segment

Definition

- The Budget Activity Segment is required by DHHS to be structured in a way that supports FARS (CFDA) reporting and both the President's Budget and Congressional Justification.

Setting up the Budget Activity Segment

- Occurs rarely, upon receipt of a written request from the NIH OB to establish a new or disable an existing Budget Activity
- FARS attributes may change at request of IC Budget Office (ICs establish FARS codes through other OD OER offices and then inform the NBS of the values)

08024620031DA0.	2003	01.	A100.	HNA1000000C	I.	00142.	511.	A500.	2651.	610001.
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Segment 8: The Mechanism Segment



Segment 8: The Mechanism Segment

Definition

- The Mechanism segment supports budget reporting at the NIH mechanism table level.

Setting up the Mechanism Segment

- Occurs rarely, upon receipt of a written request from the NIH OB to establish a new or disable an existing Mechanism
- Sample Values:
 - 005 Extramural Program
 - 501 Inhouse
 - 506 Intramural
 - 601 RMS

08024620031DA0.	2003	01.	A100.	HNA1000000C	I.	00142.	511.	A500.	2651.	610001.
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Segment 9: The Line Item Segment



Segment 9: The Line Item Segment

Definition

- The Line Item Segment is a catch-all segment that will be used for several purposes during initial deployment.

Setting up the Line Item Segment

- Requires IC budget office to submit request for new/disabled Line Item value to the NBS Team for verification that change is needed to maintain unique accounts in NBS and ADB
 - Generally, Gift Funds and CRADAs will require new Line Items for each account
 - Line Items in the regular appropriation should be carefully evaluated to determine if segments already coded could provide a unique code combination without establishing a new Line Item code - goal is to minimize use of Line Item

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Segment 10: The Object Class Segment



Segment 10: The Object Class Segment

Definition

- Values currently mirror the DHHS Object Class Code table, which contains 4 character Object Class values. This segment is designated by DHHS as a 7 character code showing the classification by object of expenditure such as payroll, contract or grant. DHHS will control all values, at least through Track 1.

Setting up the Object Class Segment

- Changes only at the direction of DHHS

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Segment 11: The SGL Segment



Segment 11: The SGL Segment

Definition

- The US Standard General Ledger Account provides for tracking funds by proprietary (cash, payables, expenses) as well as budgetary accounts (Commitments, Obligations). This information is used to track transactions and produce financial reports. The SGL Codes will be recorded in Oracle as transactions are posted.

Setting up the SGL Segment

- Changes only at the direction of DHHS

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Maintaining ACS Segment Values



Maintaining ACS Segment Values

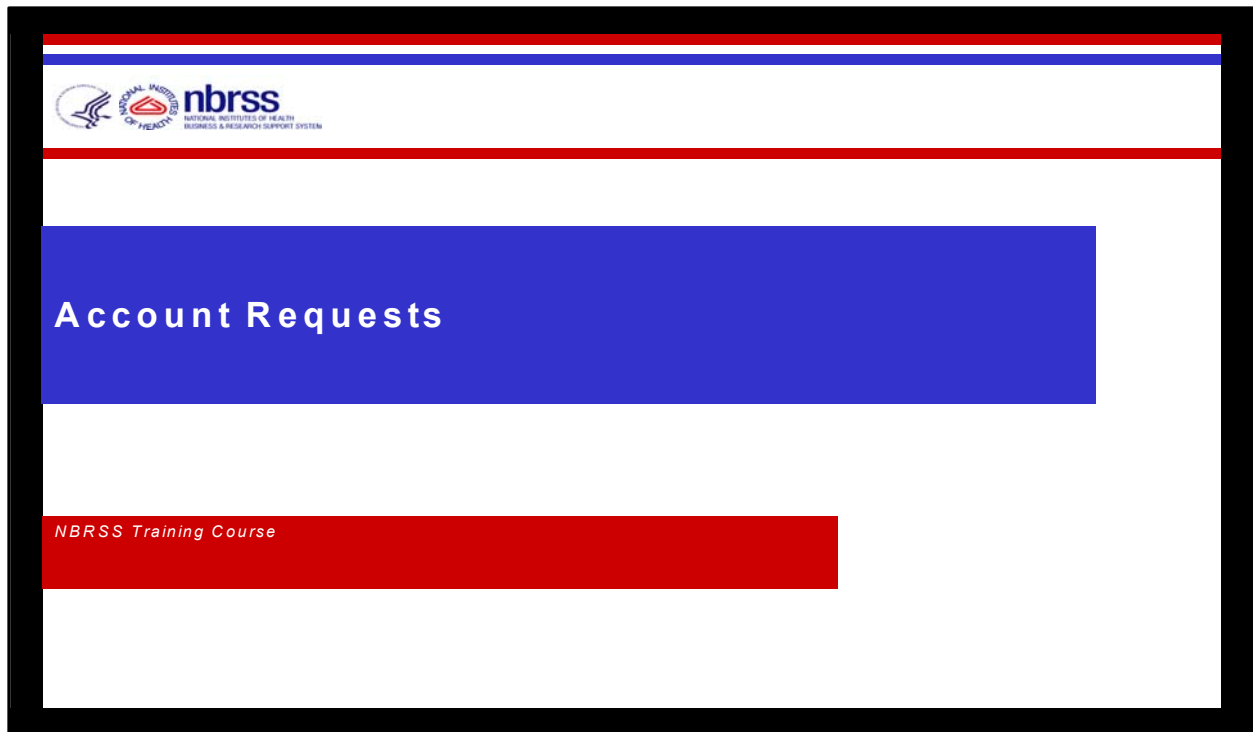
- The range of possible values for each ACS segment will change and grow based on updates from the Department, the Office of Budget or the ICs. Potential changes include:
 - A memo describing a new fund, usually from NIH OB
 - New Object Class Codes from the Department
 - A New Organization receiving a Budget Allocation from an IC
- The list of values maintained in the NBS for each segment of the ACS must reflect the latest information established by the Department or other sources so NIH staff can use the most up-to-date values when creating their budgetary accounts
- Coordination among ICs, OFM branches and the NBS Team will be necessary to ensure new data values are entered into the NBS in a timely manner
- You can see all ACS values used by your IC in your ADI spreadsheet.

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Account Requests

Chapter 3

Account Requests



Lesson Objectives

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Lesson Objectives

- Overview of Account Request Process
- Working with Operating Budget Accounts
- Working with Oracle Projects

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Overview of Account Request Process

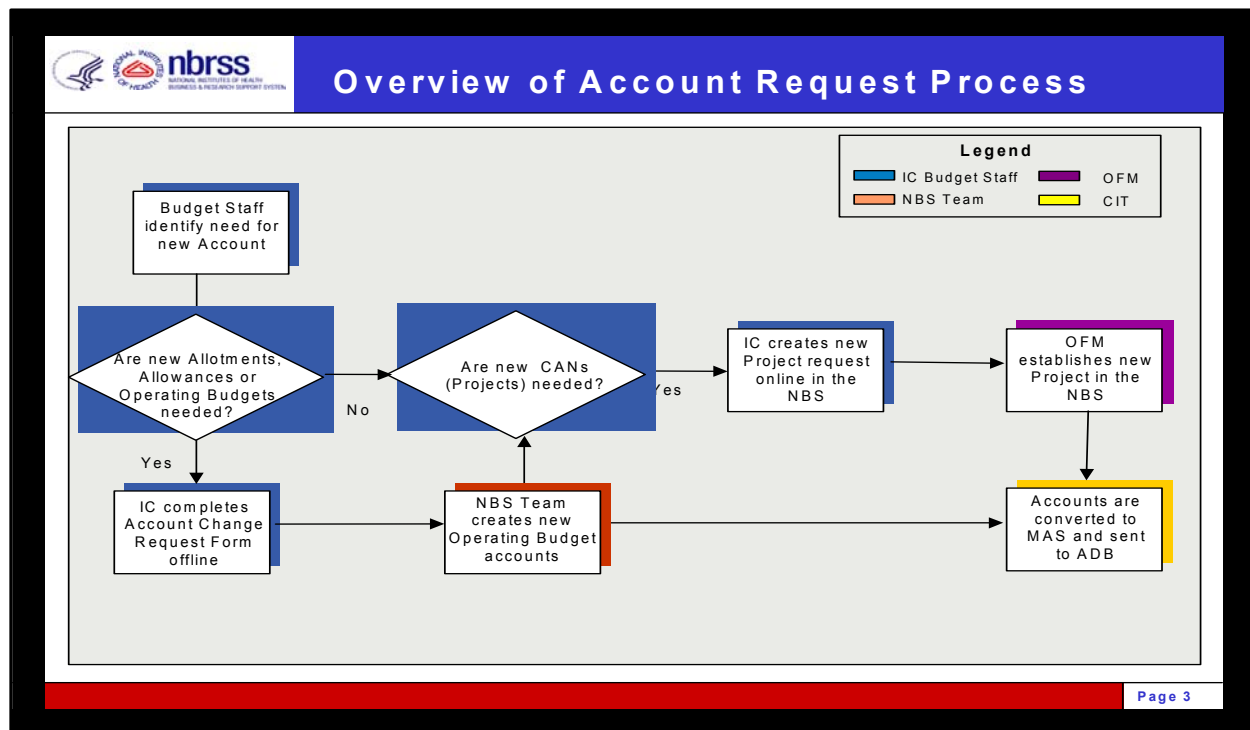
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Overview of Account Request Process

- Overview of Account Request Process
 - Working with Operating Budget Accounts
 - Working with Oracle Projects

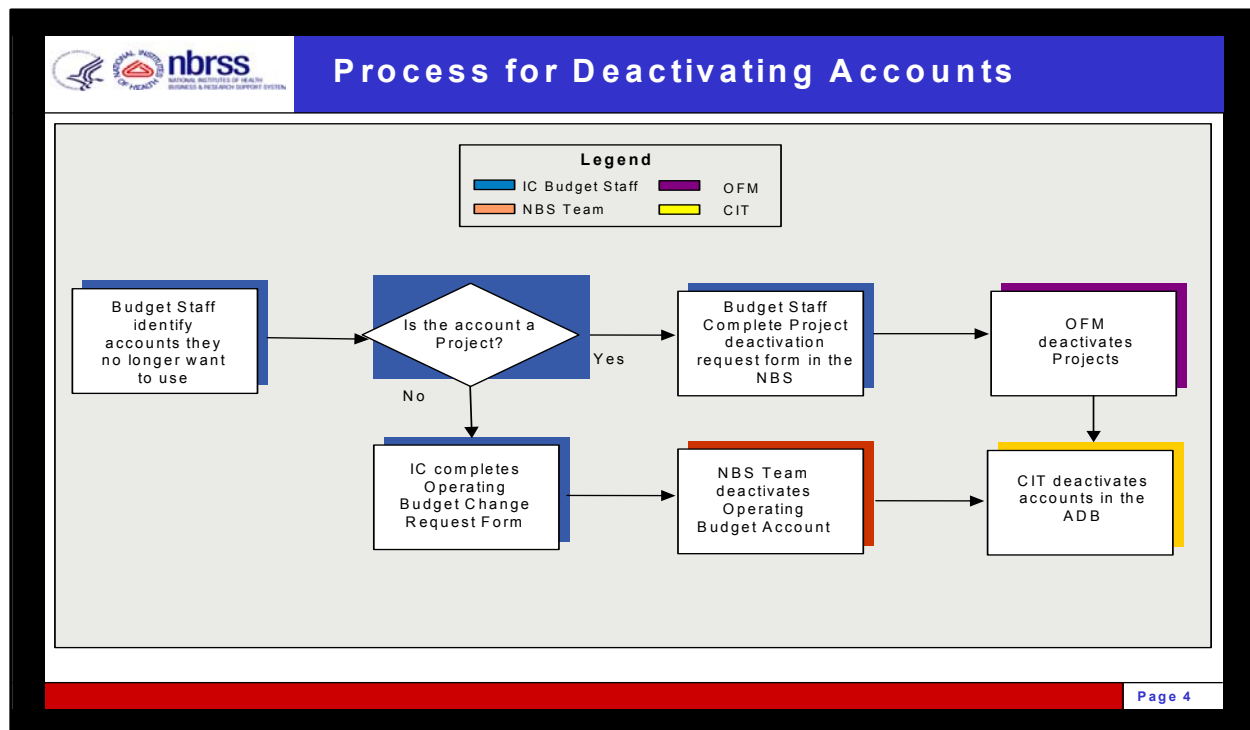
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Overview of Account Request Process




- All new account requests for both the ACS and the MAS are now made through the NBS.
- New Allotment, Allowance and Operating Budget requests will be made using an offline form that is available on the NIH portal <http://my.nih.gov> – NBRSS Budget/Finance Community. These sheets will be completed and emailed to the NBS Project Team, who will set them up in the NBS.
- New CAN (Project) requests will be made using an NBS application that you will be working with in today's training.
- Once an account is created in the NBS, an automated process will convert it into the MAS format and forward the legacy CAN to the ADB.

Process for Deactivating Accounts



- All account deactivations are also now made through the NBS.
- Allotment Allowance and Operating Budget deactivation requests will be made using form that is available on the NIH Portal. These sheets will be completed and emailed to the NBS Project Team, who will deactivate the requests accounts in the NBS.
- CAN (Project) deactivation requests will be made using the online NBS application.
- Once a Project is deactivated in the NBS, an automated process will forward the deactivation request to the ADB, where the related MAS CAN will be deactivated as well.

Working with Operating Budget Accounts

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Working with Operating Budget Accounts

- Overview of Account Request Process
- Working with Operating Budget Accounts
- Working with Oracle Projects

Page 5

Working with Operating Budget Accounts




Working with Operating Budget Accounts

- An Operating Budget Account is the combination of segment values that creates a specific budgetary account, and is equal to an Allowance in the current MAS.
- An Operating Budget Account must exist in the NBS before an Oracle Project (CAN) can be created and associated with that specific Operating Budget Account. This exactly replicates the legacy practice of having an Allowance in place before related Projects can be established. The Allowance is the parent to the Project
- For example, if an IC wants to create a Project (CAN) using the partial ACS string
08024620031DA0.2003.01. A100. HNA1000000C.I.00142. 511. A500.
and that particular combination does not exist in the NBS, an Operating Budget containing these values must be established by the NBS Team prior to setting up any related Projects (CANs).

Page 6

Requesting Changes to Operating Budget Accounts

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BUSINESS & RESEARCH SUPPORT SYSTEM

Requesting Changes to Operating Budget Accounts

CSBAB4-May-2003

Request to Change Operating Budget (MAS Allowance) Accounts

Add or delete? _____


MAS Values		ACS Values	
IMN		Fund	
Direct/Reim		Budget FY	
First FY of use		Fund Limit	
Allotment #		Allot Org	
Allowance #		Org for Op Budget	
Accounting Pt		Internal/External	
Budget Activity		Budget Activity	
Sub Budget Activity		Mech	
		Line Item	
		SGL	461003
English Label:			

email to NBRSS-Budgets

Page 7

- The NBS Team has created the Change Budgetary Account forms, which will be used to submit all requests to set up or deactivate Operating Budget Accounts
- Steps for completing this form:
 1. Identify the need for a new account(s).
 2. Identify the MAS Values using your hard-copy MAS report.
 3. Identify which specific ACS segment values must be combined to create this new account using the ADI tab of your ADI budget entry spreadsheet.
 4. Complete either the Change One Budgetary Account form or Change Many Budgetary Accounts form, depending on the number of accounts you are creating.
 5. Email this form to the NBS Team using the “NBRSS - Budgets” mailbox located in the Microsoft Outlook Global Address List.
 6. If you are unsure of the specific segment combination needed, the NBS Team will help you to identify which values compose your new account.
 7. Receive confirmation from the NBS Team that the Operating Budget has been established.
- Once your new Operating Budget is created, you can set up related Projects using the information provided in this training course.

Identifying MAS Information for the Change Request Form



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Identifying MAS Information for the Change Request Form

10/16/03 12:38:50 PM
Report MAS01

**NIH/NBRSS
Management Accounts Structure - Legacy
For Appropriation FY = 2004**

Allotment CAN	Allowance CAN	Project CAN	D/R	FARS Code	Project Nbr (MAS)	Project Nbr (NBRSS)	Project Description
IC:	NHGRI						
IMN:	045						
Appropriation:	75	X 514					
Allotment:	26 CRADA-NATIONAL HUMAN GENOME RESEARCH INSTITUTE						
Budget Activity:	73 INTRAMURAL RESEARCH - NHGRI						
Allowance:	260 NHGRI COOPERATIVE RESEARCH & DEVELOPMENT AGREEMENTS						
Cost Center:	260 NHGRI-CRADAS-CDB						
Cost	8324875	8337465	D	99999	002	114115	CHIRON INC #9902-37
Cost	8324875	8324877	D	99999	001	114116	GENETIC DISEASE RSCH CRADA1
Cost Center:	262 NHGRI-CRADAS-GMB						
8990816	8324875	832487		99	001	114117	GENOME MOLECULAR BIOLOGY CRADA1
Cost Center:	263 NHGRI-CRADAS-GTB						
8990816	8324875	833746		99	004	114121	GTB CRADA 1
Cost Center:	264 NHGRI-CRADAS-MGB						
8990816	8324875	8324864		99999	001	114122	LTR ANTISENSE TECHNOLOGY, INC.
8990816	8324875	8337460	D	99999	002	114123	ORTHOGENE INC #9810-32
Cost Center:	265 NHGRI CRADAS COTB						

Allotment

Allowance

Budget Activity

D/R

Page 8

[illegible]

- Red = Fund
Blue = Allotment
Green = IE Allowance
Orange = Operating Budget

- When requesting a new Operating Budget account, the codes selected for Org, Budget Activity, Mechanism, and Line Item must combine to create define a unique account.

Setting Up Operating Budget Accounts



Setting Up Operating Budget Accounts

- **Examples of reasons for new Operating Budget Accounts:**
 - The IC wants to take advantage of the mechanism codes now available in the General Ledger
 - OB defines a new Fund Limit, Mechanism or Budget Activity value and the IC wants to set up an account using the new value
 - The IC reorganizes and wants to set up accounts using the new SAC values
 - The IC wants to set up Operating Budgets at a lower or higher level in their organization than was previously defined
 - The IC wants a new Line Item value to track a specific activity not identified by the other segment values
 - A new IC is established or Congress creates a new Fund for NIH

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Working with Oracle Projects



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BIOMEDICAL RESEARCH SUPPORT SYSTEM

Working with Oracle Projects

- Overview of Account Request Process
- Working with Operating Budget Accounts
- Working with Oracle Projects

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Working with Oracle Projects



Working with Oracle Projects

- Oracle Projects will be used to create all new Projects (CANs) and deactivate existing Projects in the NBS.
- The NBS provides electronic forms to capture new Project and deactivation requests. The New Project request form replaces the current paper-based CAN request form and includes data for both systems' (ADB and NBS) needs.
- Once created, each new Project Account will be associated with the appropriate ACS string, translated into a CAN and its related explosion values, and transferred to the ADB to support legacy CAN-based systems through an automated process.
- Every Project that is deactivated in Oracle will be deactivated in the ADB through an automated process.

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Project Account Maintenance Tasks



Project Account Maintenance Tasks

IC Budget staff will be performing the following activities related to Projects:

- Entering new Project requests
- Receiving notification of approved Projects
- Checking the IC COA Log to determine status of Project requests
- Working with TASC to resolve problems with rejected projects
- Deactivating Projects that are no longer used

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Lessons on Requesting New Projects



Lessons on Requesting New Projects

- The following lessons will present the detailed steps Budget Staff must perform to complete a project request:
 - Lesson 1: Getting Started with the NBS
 - Lesson 2: Establishing a new Project request
 - Lesson 3: Deactivating a Project
 - Lesson 4: Working with the Request Log
 - Lesson 5: Submitting or Deleting Pending Requests

Getting Started with the NBS



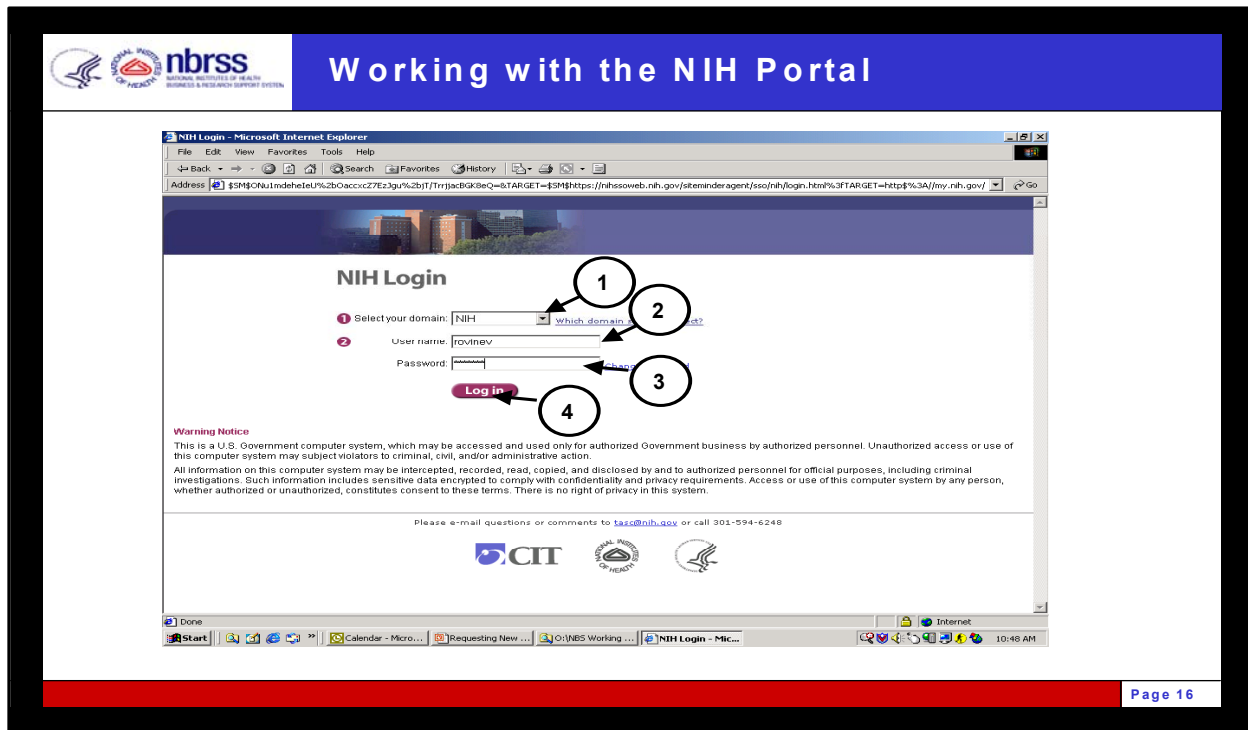
The slide features a blue header bar with the text "Getting Started with the NBS" in white. On the left side of the header, there are three logos: the Department of Health logo, the National Institutes of Health logo, and the NBRSS logo. The main content area is white and contains the text "Lesson 1: Getting Started with the NBS" in blue. A red footer bar at the bottom right contains the text "Page 15".

Getting Started with the NBS

Lesson 1: Getting Started with the NBS

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Working with the NIH Portal

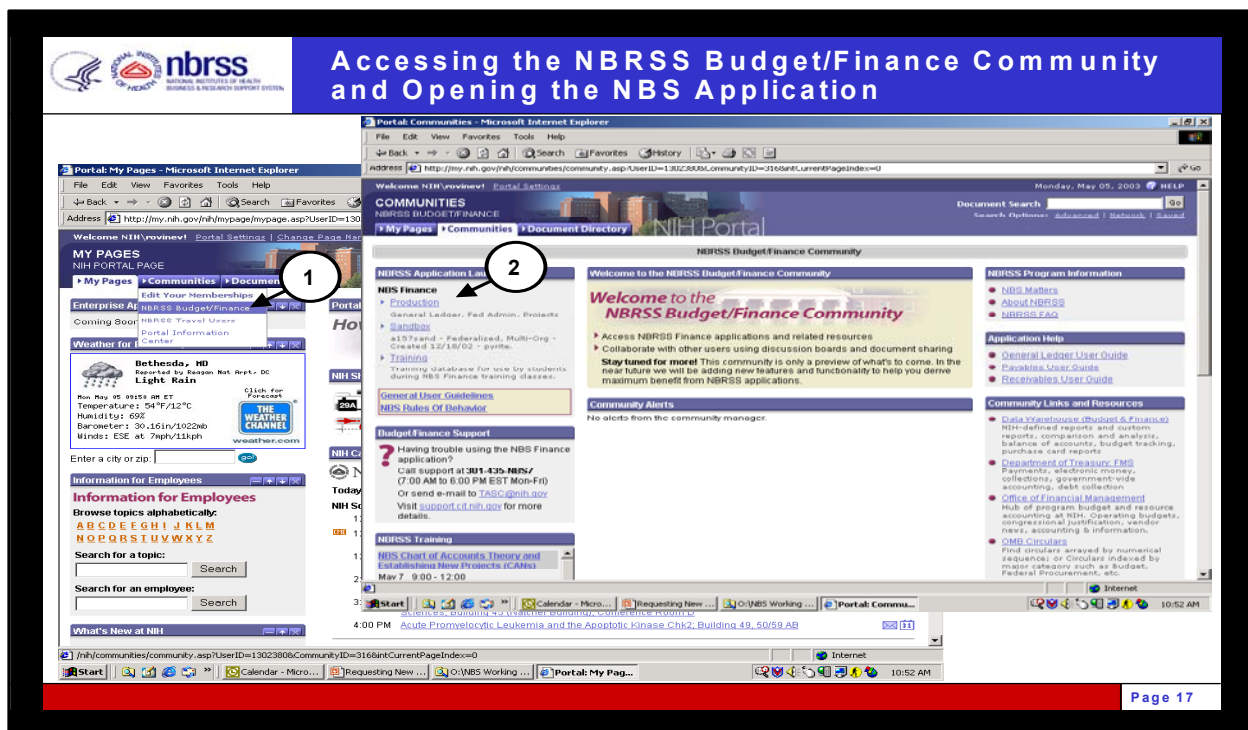


All NBS applications are accessible through the NIH Portal.

To login to the NIH Portal you will need to complete the following steps:

1. Select your NT Domain from the drop down list
2. Enter your User Name
3. Enter your Password
4. Click the Log in button

Accessing the NBRSS Budget/Finance Community and Opening the NBS Application



- The NIH Portal is organized by “communities”, which are specific functional areas of interest for different groups at NIH. Examples of communities are Travel Planners or NBRSS Budget/Finance.
- To access the NBS Oracle Project module:
 1. Browse to the “NBRSS Budget/Finance” Community Page by clicking on the Communities tab and selecting NBRSS Budget/Finance from the list.
 2. Click on the applications link located on the upper left side of the page to access the NBS application. For today’s session, you will select the Training link. When you begin to use the system, you will select the Production link.

Accessing the NBRSS Budget/Finance Community and Opening the NBS Application

Accessing the NBRSS Budget/Finance Community and Opening the NBS Application

****WARNING****

This is a U.S. Government computer system, which may be accessed and used only for authorized Government business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil, and/or administrative action.

All information on this computer system may be intercepted, recorded, read, copied, and disclosed by and to authorized personnel for official purposes, including criminal investigations. Such information includes sensitive data encrypted to comply with confidentiality and privacy requirements. Access or use of this computer system by any person, whether authorized or unauthorized, constitutes consent to these terms. There is no right of privacy in this system.

ORACLE
Applications

User Name

Password

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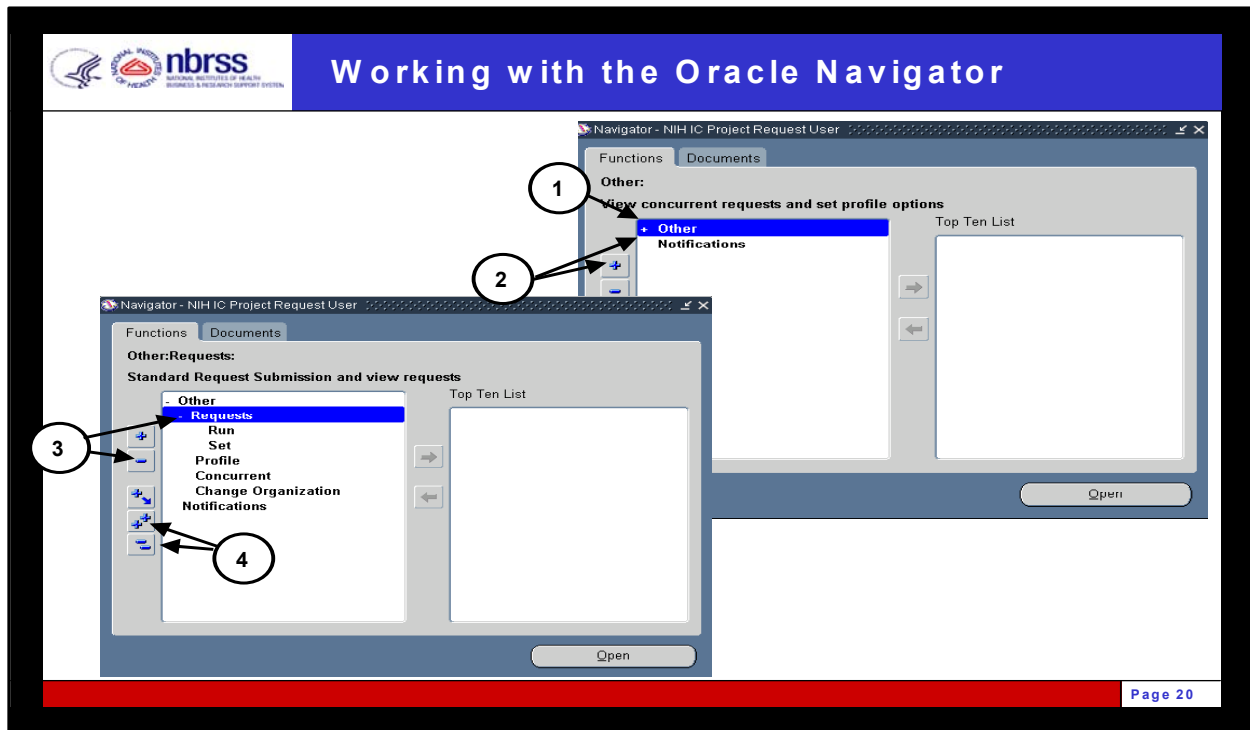
- The Oracle Login window is where you will enter your User Name and password.
- Use the [Account Request Form - General Ledger/Federal Administrator](#) to request access to the NBS. You will need to request the NIH IC Project Request User responsibility.

Selecting Responsibilities



- Once you have logged into the NBS, you must select a responsibility.
- A responsibility defines the NBS functions you can perform and the screens and data you can access. If you perform multiple functions within the NBS, you may be assigned multiple responsibilities.
- If you only have one responsibility, you will not see this window and will go directly into the Projects application.

Working with the Oracle Navigator



- The Oracle Navigator window lists all of the functions you can perform using the responsibility you selected.
1. Functions are arranged hierarchically within the function window. A plus sign next to a function indicates that there are related subfunctions under the function.
 2. To see related subfunctions either double click on the function or single click on the function and then click the plus sign on the left side of the window.
 3. To collapse subfunctions either double click on the higher level function or single click on the higher level function and click on the minus sign on the right side of the window.
 4. You can expand all functions or collapse all functions by clicking on the multiple plus sign or multiple minus sign.

Working with the Submit Request Window

The screenshot shows the 'Submit Request' window with the following sections and controls:

- Run this Request...** (Callout 1): Includes a 'Name' field, 'Parameters' and 'Language' dropdowns, a 'Copy...' button, and a 'Languages...' button.
- At these Times...** (Callout 2): Includes a 'Run the Job' dropdown set to 'As Soon as Possible' and a 'Schedule...' button.
- Upon Completion...** (Callout 3): Includes a checked 'Save all Output Files' checkbox, 'Notify' and 'Print to' fields, and an '@ptions...' button.

At the bottom are buttons for 'Help (B)', 'Submit', and 'Cancel'.

1. The Run this Request section enables you to select requests from a list of values.
2. The At these Times section enables you to schedule the requests to run at a certain time (not recommended for this process).
3. The Upon Completion section enables you to notify others of your request, or print your request.

Working with the Submit Request Window

The screenshot shows the 'Submit Request' window with the following components and callouts:

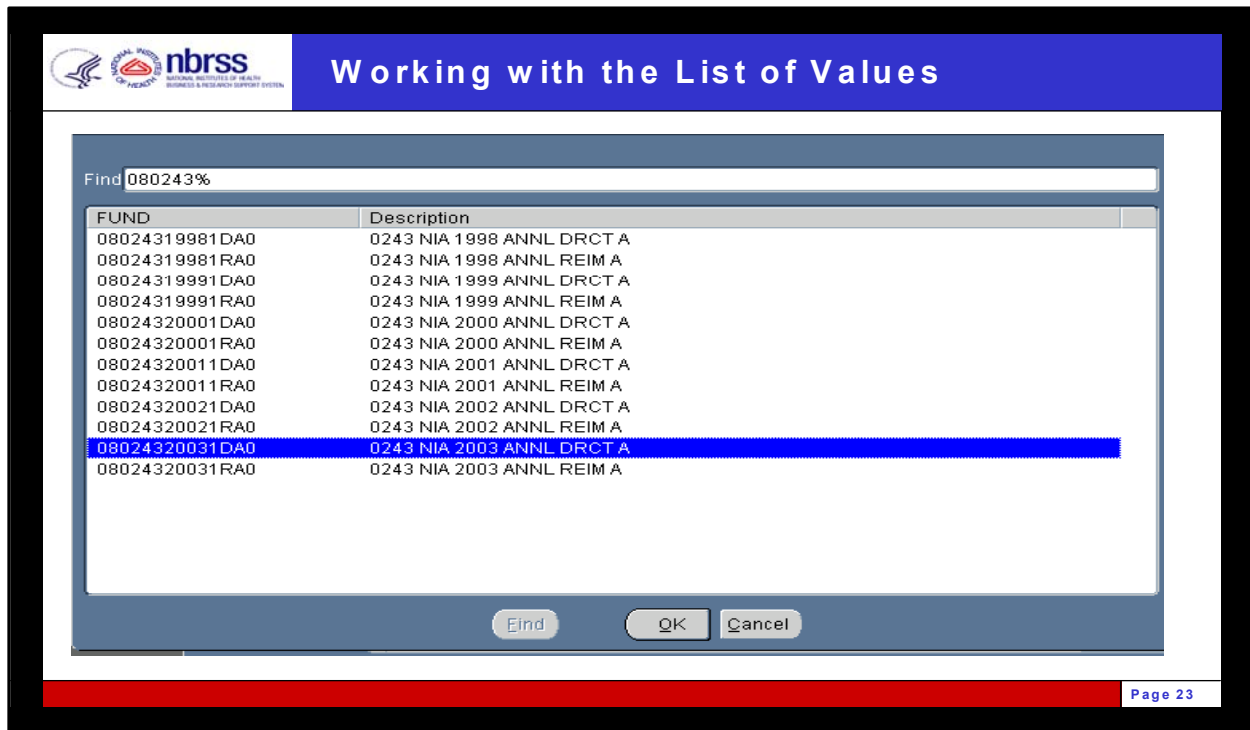
- 1**: Points to the 'Name' text field, which has a yellow background.
- 2**: Points to the 'Copy...' button.
- 3**: Points to the ellipsis (three dots) at the end of the 'Name' field.
- 4**: Points to the 'Submit' button.

The window contains the following sections:

- Run this Request...**
 - Name: [Yellow field with ellipsis]
 - Parameters: [Grey field]
 - Language: [Grey field]
 - Buttons: Copy..., Languages...
- At these Times...**
 - Run the Job: As Soon as Possible
 - Button: Schedule...
- Upon Completion...**
 - ☒ Save all Output Files
 - Notify: [Grey field]
 - Print to: [Grey field]
 - Button: @ptions...
- Buttons:** Help (B), Submit, Cancel

- The **Submit Request** window allows you to pull up and run requests within the NBS.
1. A field with a yellow background indicates that the field is required for data entry.
 2. The Copy button enables you to copy a previous request and use it as a starting point for a new request.
 3. The ellipses (3 dots) at the end of a field indicate that there is a list of values (LOV) you can use to select a desired value.
 4. The Submit button enables you to submit your request for processing.

Working with the List of Values



- If you click on a list of values icon, the LOV will appear. You can scroll through this list of values to locate your value, or you can use the Find field to narrow your search.
- The % sign in the Find field is a wildcard that will allow you to perform a partial search in the LOV. The % sign can be used before or after known values that a user is searching for to represent unknown values.

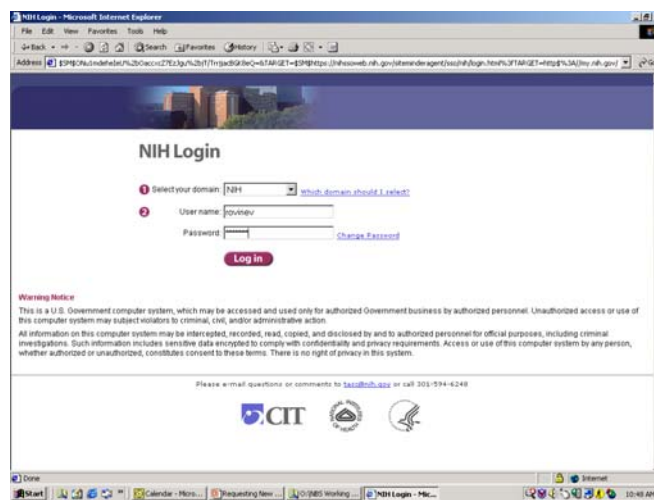
Accessing the NBS Oracle Projects Module

Purpose

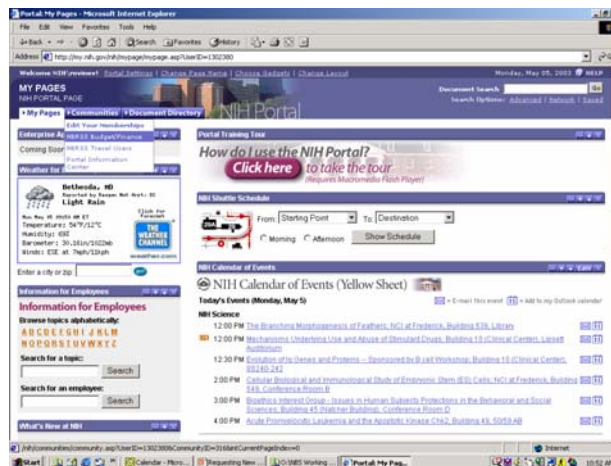
The purpose of this document is to describe how to access the NBS Oracle Projects module

NIH IC Project Request User

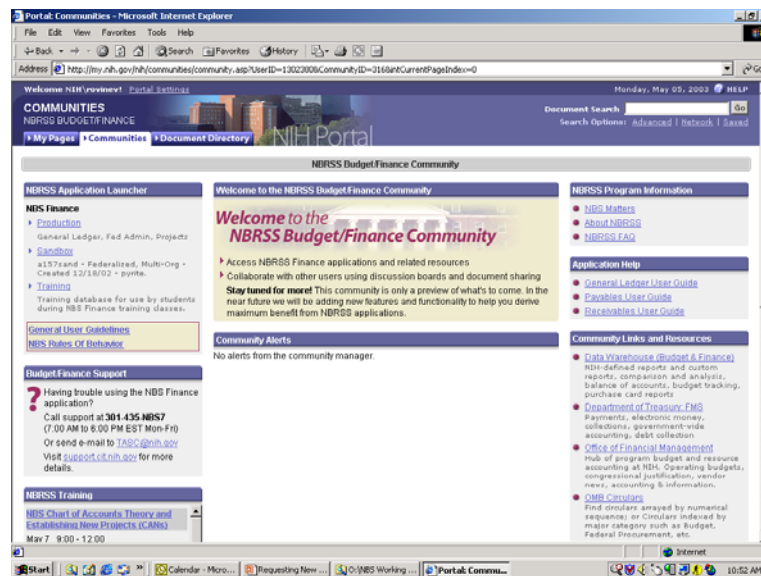
1. Launch Internet Explorer and type in the following web address: <http://my.nih.gov>.
2. Select your **NT Domain** from the drop down list and enter your User Name and Password.
3. Click the **Login** button.



4. Select the **NBRSS Budget/Finance** community from the **Communities** drop down menu.



- From the NBRSS Budget/Finance portal page, click on the **Sandbox** link to perform the classroom exercises.



- Enter your user name and password and then click on the **Connect** button. For the classroom exercise, use the user name and password provided to you by the instructor.

WARNING

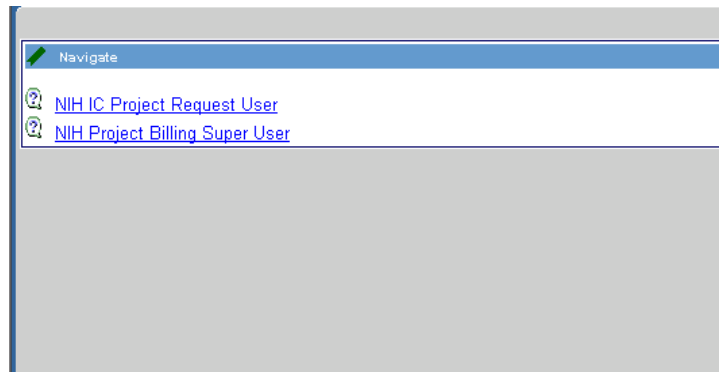
This is a U.S. Government computer system, which may be accessed and used only for authorized Government business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil, and/or administrative action.

All information on this computer system may be intercepted, recorded, read, copied, and disclosed by and to authorized personnel for official purposes, including criminal investigations. Such information includes sensitive data encrypted to comply with confidentiality and privacy requirements. Access or use of this computer system by any person, whether authorized or unauthorized, constitutes consent to these terms. There is no right of privacy in this system.

User Name


Password

7. Click on the **NIH IC Project Request User** link to select this responsibility. If you only have one responsibility, this responsibility will automatically open.



End of activity

Establishing New Project Requests

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Establishing New Project Requests

Lesson 2: Establishing New Project Requests

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Lessons on Requesting New Projects



Lessons on Requesting New Projects

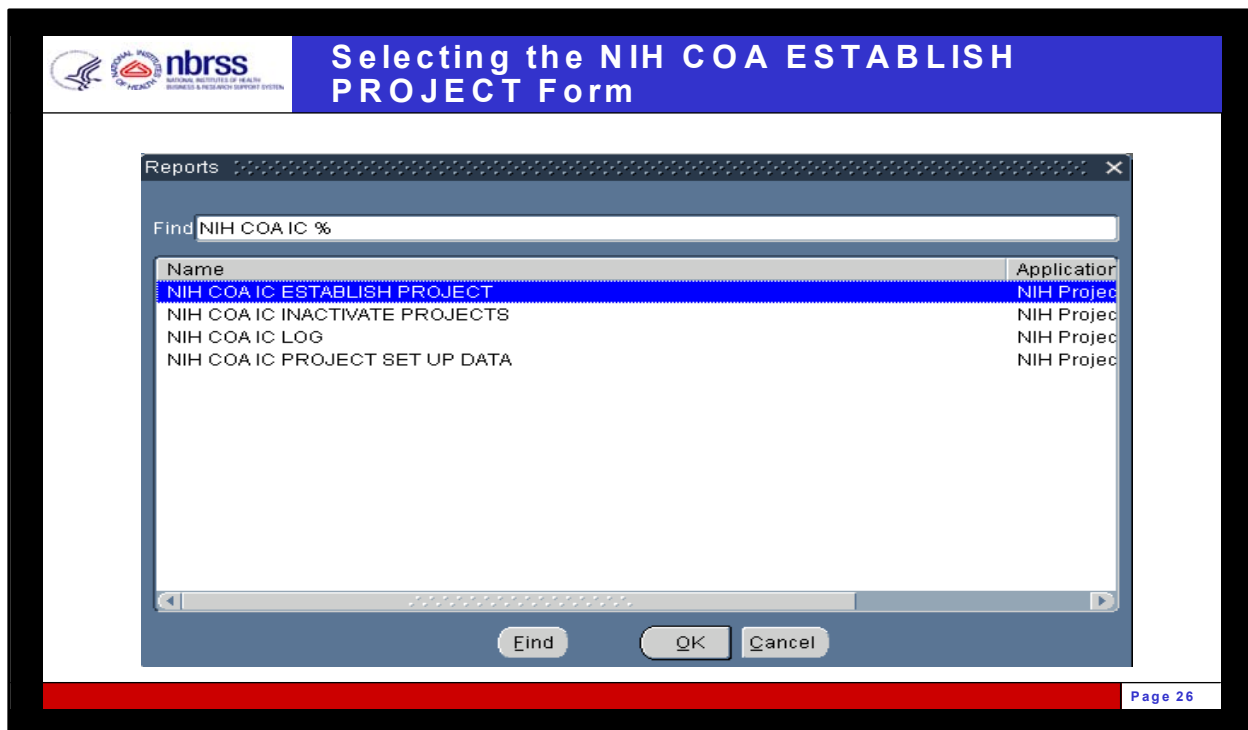
- You will need to organize the following information before you can enter a request for a new Project:
 - The Project Description – the name of the new Project
 - The Project Owning Org – The organization within the IC for which spending is tracked*
 - The Project Manager – the Budget Officer
 - The Project Duration Start Date – when will the Project begin incurring obligations
 - The ACS values related to the Project**
 - The MAS Cost Center

*The Project Owning Org MUST have a valid Standard Administrative Code (SAC) or it will not be available for selection

**ACS values for your IC are located in your IC's Budget Entry ADI spreadsheet

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Selecting the NIH COA ESTABLISH PROJECT Form



- There are four types of requests that you can use in Oracle Projects:
 - NIH COA ESTABLISH PROJECT – Used to create new Project requests
 - NIH COA IC INACTIVATE PROJECTS – Used to create deactivation requests
 - NIH COA IC LOG – Used to access a log that tracks the status of a request
 - NIH COA IC PROJECT SET UP DATA – Used to submit or delete pending requests
- To establish a new Project, you will select the first value – NIH COA ESTABLISH PROJECT.

Overview of the NIH COA ESTABLISH PROJECT Form

The screenshot shows a software window titled "Parameters" with a blue header bar. The header bar contains the NIH logo, the text "nhrss NATIONAL INSTITUTE OF HEALTH BUSINESS & RESEARCH SUPPORT SYSTEM", and the title "Overview of the NIH COA ESTABLISH PROJECT Form". The main area of the window is a list of fields for project information. Fields with yellow backgrounds are required. The fields are: Project Description 1 through 10 (all yellow), Project Owning Org (yellow), Project Manager (Key Member) (yellow), Project Duration Start Date (yellow), Customer (for reimbursable contract projects) (white), GL Account Information (gray), MAS Cost Center# (gray), and MAS Cost Center Label (yellow). At the bottom of the window are buttons for OK, Cancel, Clear, and Help. A red bar at the bottom right of the window contains the text "Page 27".

- When you select the NIH COA IC ESTABLISH PROJECT, the new project request form will appear.
- You will use this project request form to enter information relating to your new project(s). Remember, all fields with yellow backgrounds are required fields.

Entering Project Descriptions

The screenshot shows a software interface titled "Entering Project Descriptions" with the nbrss logo. It features a "Parameters" window with a list of ten "Project Description" text boxes, which are highlighted by a red rectangle. Below these are fields for "Project Owning Org", "Project Manager (Key Member)", "Project Duration Start Date", "Customer (for reimbursable contract projects)", "GL Account Information", "MAS Cost Center#", and "MAS Cost Center Label". Navigation buttons "OK", "Cancel", "Clear", and "Help" are at the bottom. The page is labeled "Page 28" in the bottom right corner.

- The first step you must take when you setup a new Project request is to enter an informative Project Description.
- The Project Description you enter will also serve as the CAN label in the ADB.
- Behind the scenes, Oracle will assign a six-digit Project Number and a seven-digit CAN to each Project you create. These numbers will be emailed to you when OFM sets up your new Project.
- You must enter at least one Project Description, but may include up to ten if the Operating Budget and other Project attributes are the same.

Assigning a Project Owning Org

Parameters

Project Description 1
Project Description 2
Project Description 3
Project Description 4
Project Description 5
Project Description 6
Project Description 7
Project Description 8
Project Description 9
Project Description 10
Project Owning Org
Project Manager (Key Member)
Project Duration Start Date
Customer (for reimbursable contract projects)
GL Account Information
MAS Cost Center#
MAS Cost Center Label

OK Cancel Clear Help

Page 29

- The Project Owning Org refers to the organization within the IC that controls a specific Project's (CAN's) spending.
- The Project Owning Org will drive or can filter the information available in drop down menus in other NBS modules.
- The NBS Team recommends , but does not require, that this organization is at a lower level than the Operating Budget Org.
- The Project Owning Org must be a valid Standard Administrative Code (SAC) listed in the LOV for this field.*

*If the SAC value you want to assign is not in the LOV, please review your official structure and consult with your Organization Change Coordinator.

If a new SAC is needed, your IC will need to work with the Office of Management Assessment (OMA) to establish the new value. Once the SAC value has been approved and updated in the HRDB, it will flow through automatically to the NBS.

Selecting a Project Manager (Key Member)

The screenshot shows a software window titled "Parameters" with a subtitle "Selecting a Project Manager (Key Member)". The window contains a list of fields for project configuration. The "Project Manager (Key Member)" field is highlighted with a red rectangle. The fields are as follows:

Field Name	Value
Project Description 1	
Project Description 2	
Project Description 3	
Project Description 4	
Project Description 5	
Project Description 6	
Project Description 7	
Project Description 8	
Project Description 9	
Project Description 10	
Project Owning Org	
Project Manager (Key Member)	
Project Duration Start Date	
Customer (for reimbursable contract projects)	
GL Account Information	
MAS Cost Center#	
MAS Cost Center Label	

At the bottom right of the dialog box are four buttons: OK, Cancel, Clear, and Help.

- The Project Manager (Key Member) is usually the Budget Officer. You can select the appropriate name from the LOV.
- This value can be changed after Project approval.
- The Project Manager you assign will receive email notifications for each new Project that is set up in the NBS.

Assigning a Project Duration Start Date

The screenshot shows a software window titled 'Parameters' with a blue header bar. The header bar contains the nbrss logo on the left and the title 'Assigning a Project Duration Start Date' in white text. The main area of the window is a list of parameters, each with a corresponding text input field. The parameters are: Project Description 1 through 10, Project Owning Org, Project Manager (Key Member), Project Duration Start Date (highlighted with a red box), Customer (for reimbursable contract projects), GL Account Information, MAS Cost Center#, and MAS Cost Center Label. At the bottom of the window are four buttons: OK, Cancel, Clear, and Help. A red bar at the bottom of the screenshot contains the text 'Page 31'.

- The format for the Project Duration Start Date must be DD-MMM-YYYY.
- This is the date the Project can begin incurring expenses.
- The value in this field can be future-dated.

Adding a Customer

The screenshot shows a software window titled "Parameters" with a blue header bar containing the "nbrss" logo and the text "Adding a Customer". The window contains a list of input fields for project details. The "Customer (for reimbursable contract projects)" field is highlighted with a red rectangular border. Below the fields are buttons for "OK", "Cancel", "Clear", and "Help". A red horizontal bar at the bottom of the image contains the text "Page 32".

- Projects can be Direct or Reimbursable, just like CANs.
- The Customer field is completed only if the project you are requesting is reimbursable.
- If your Project is reimbursable, select the only value that is valid for this field, "Conversion Customer".
- When additional Projects functionality becomes available in future deployments, you may be able to assign specific customers to a Project.

Associating ACS Values with Your Project

The screenshot shows a software window titled 'Parameters' with a blue header bar. The header bar contains the nhrss logo on the left and the title 'Associating ACS Values with Your Project' on the right. The main area of the window is a list of project parameters, each with a corresponding text input field. The parameters are: Project Description 1 through 10, Project Owning Org, Project Manager (Key Member), Project Duration Start Date, Customer (for reimbursable contract projects), GL Account Information, MAS Cost Center#, and MAS Cost Center Label. The 'GL Account Information' field is highlighted with a red rectangular border. At the bottom of the window, there are four buttons: OK, Cancel, Clear, and Help. A red bar at the bottom of the screenshot contains the text 'Page 33' on the right side.

- The GL Account Information field enables you to associate ACS values with your Project.
- When you click inside this field, it launches the Accounting Flexfield window, which displays your ACS fields.

Entering ACS Segment Values

Entering ACS Segment Values

Accounting Flexfield

Segment	Value	Status
FUND		Active
BFY		Active
FUND LIMIT		Active
ALLOT ORG		Active
ORG		Grayed Out
IE		Grayed Out
B ACT		Active
MECH		Grayed Out
LINE ITEM		Grayed Out
OBJECT CLASS		Grayed Out
SGL		Grayed Out
COHORT	9999	DEFAULT
HHS F1	9999	DEFAULT
NIH F1	9999	DEFAULT

OK Cancel Combinations Clear Help

Page 34

- You will need to enter the ACS segment values associated with your project so OFM will know which segment values to assign to your new project.
- You can type the segment values directly into each field, or you can use the LOV to select values for each field. It is recommended that you use the LOV to increase accuracy.
- The values you enter/select must be valid segment values defined in the NBS. The system will not allow you to proceed if you enter a value that does not exist for a particular segment.
- If you do not have a specific value for the Line Item segment in your ADI sheet, select the default value, which will be a series of “9s”.
- You will not enter values for the grayed out fields.

Entering Cost Centers

The screenshot shows a web-based form titled "Entering Cost Centers" with the nbrss logo in the top left. The form is a "Parameters" window with a list of fields on the left and input boxes on the right. The fields include Project Description 1 through 10, Project Owning Org, Project Manager (Key Member), Project Duration Start Date, Customer (for reimbursable contract projects), GL Account Information, MAS Cost Center#, and MAS Cost Center Label. The MAS Cost Center# and MAS Cost Center Label fields are highlighted with a red rectangular box. At the bottom of the form are buttons for OK, Cancel, Clear, and Help. A red bar at the bottom right of the page contains the text "Page 35".

- If you are adding the new Project to an existing Cost Center, simply enter the number of the Cost Center in the MAS Cost Center # field. The Cost Center label will automatically populate.
- If you want to establish a new Cost Center, you cannot enter a new value directly into the MAS Cost Center # field. You must type the desired Cost Center label into the MAS Cost Center Label field. Any new Cost Centers you establish will appear in the Table 19 Report.
- If you want a specific Cost Center Number for your new Cost Center, enter the desired number into the Comments field.
- You cannot update an existing Cost Center Label using this form. You will need to work with OFM staff if you want to change a Cost Center Label.
- You cannot move Projects (CANs) from one Cost Center to another, you will have to continue the legacy practice of inactivating the existing Projects and creating new ones using the new Cost Center value.

Completing the Process Immediately Field

Parameters

Project Description 4

Project Description 5

Project Description 6

Project Description 7

Project Description 8

Project Description 9

Project Description 10

Project Owning Org

Project Manager (Key Member)

Project Duration Start Date

Customer (for reimbursable contract projects)

GL Account Information

MAS Cost Center#

MAS Cost Center Label

Process Immediately Y Yes

Comments

Project Duration Close Date

OK Cancel Clear Help

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- You will also need to fill in the Process Immediately field.
- If you enter “Y” for Yes, the system will automatically forward your request to OFM.
- If you enter “N” for No, your request will go into a “pending” status and will require a separate step to submit the request to OFM. You may want to use this option when you are undertaking a major reorganization.

Entering a Project Duration Close Date

The screenshot shows a software window titled "Entering a Project Duration Close Date". The window has a blue header bar with the NBRSS logo and the title. Below the header, there is a list of parameters for a project. The parameters are:

- Project Description 4
- Project Description 5
- Project Description 6
- Project Description 7
- Project Description 8
- Project Description 9
- Project Description 10
- Project Owning Org
- Project Manager (Key Member)
- Project Duration Start Date
- Customer (for reimbursable contract projects)
- GL Account Information
- MAS Cost Center#
- MAS Cost Center Label
- Process Immediately ☒ Yes
- Comments
- Project Duration Close Date**

The "Project Duration Close Date" field is highlighted with a red rectangle. It is currently blank. At the bottom of the window, there are buttons for "OK", "Cancel", "Clear", and "Help".

- Certain Project accounts, such as Royalties, have specific end dates. The duration of these accounts can be identified at setup by completing the Project Duration Close Date field.
- **For most Project requests, this field should be left blank.**

Submitting Your Request

Submitting Your Request

Submit Request

Run this Request...

Name: **NIH COA IC ESTABLISH PROJECT**

Parameters: **New Project 1:.....HNN102 NIA OD OEA OFC EXTRAML AFFRS:Rovine, Valerie:10**

Copy...

Refresh Data Find Requests Submit a New Request...

Request ID Name Parent Phase Status Parameters

99279	NIH COA IC ESTABLISH F		Completed	Normal	New Project 1, , , , , , , 1519, 22
99278	NIH COA IC ESTABLISH F		Completed	Normal	1211, , , , , , , 130, 176, 10-OCT-
99277	NIH COA IC ESTABLISH F		Completed	Normal	xxx, , , , , , , 1519, 227, 10-OCT-
99276	NIH COA IC ESTABLISH F		Completed	Normal	New Project 1, , , , , , , 1519, 22
99268	NIH COA IC LOG		Completed	Normal	1350, S, IC LOG, ,
99267	NIH COA IC LOG		Completed	Normal	1350, S, IC LOG, ,
99185	NIH COA OFM LOG		Completed	Normal	1350, S, OFM LOG, , ,
99183	NIH COA OFM LOG		Completed	Normal	1350, S, OFM LOG, , ,
99170	NIH COA OFM LOG		Completed	Normal	1350, S, OFM LOG, , ,
99168	NIH COA IC LOG		Completed	Normal	1350, P, IC LOG, ,

Hold Request View Details... View Output

Cancel Request Diagnostics View Log...

Submit Cancel

Page 38

- Once you have entered all the fields for your new Project, you can submit your request by clicking on the **Submit** button.
- If you selected process immediately, your request will go directly to OFM for setup when you click the Submit button.
- If you do not select process immediately, your request will be placed on pending status until further review and final submission.
- After you submit your Project request, the Requests screen will appear, displaying your request ID and the phase and status of your request.

Error Message for No Operating Budget

The screenshot displays the NBRSS (National Institutes of Health Biomedical Research Support System) interface. At the top, a blue banner reads "Error Message for No Operating Budget". Below this, a table lists requests. Request 98819, titled "NIH COA IC ESTABLISH", is highlighted in red and has a status of "Error". Request 98796, also titled "NIH COA IC ESTABLISH", is highlighted in yellow and has a status of "Warning".

The main content area shows a log file for request ID 98819. The log text is as follows:

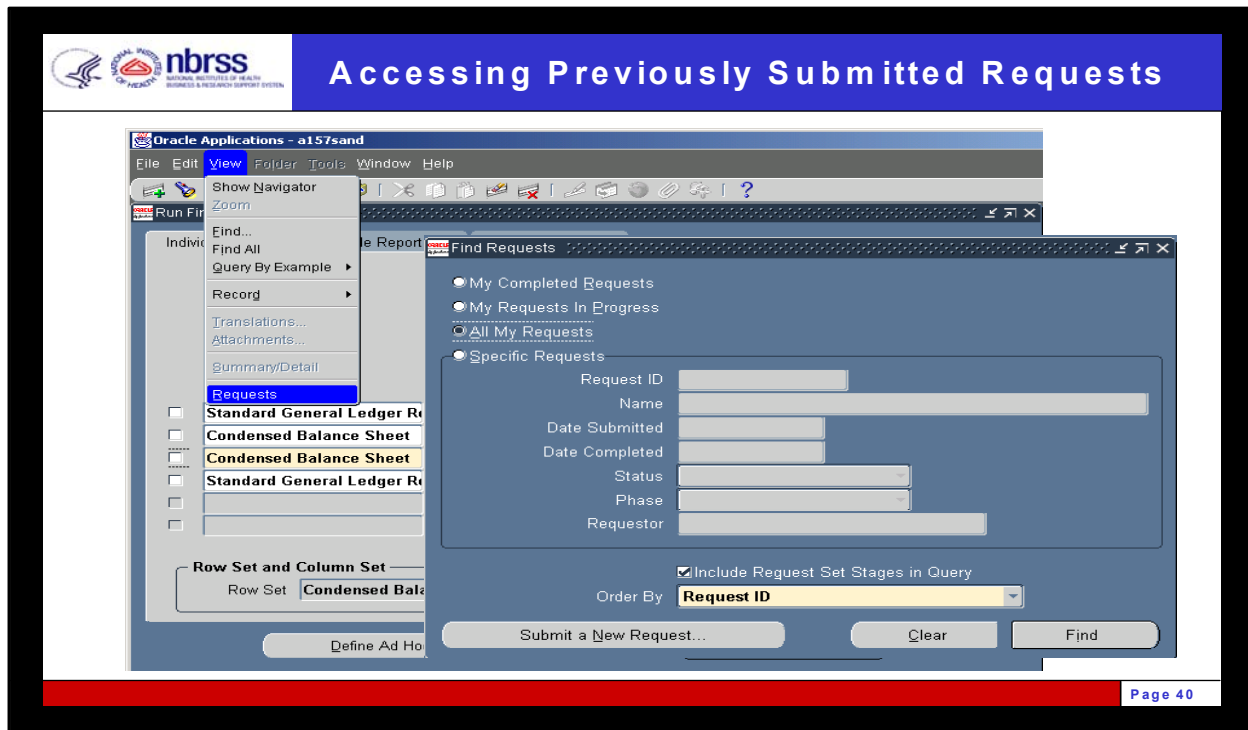
```
Log file: requestID - 98819
Page 1
Font Size 10
Project Description 10 :
Project Owning Org : 1518
Project Manager id : 199
Project Duration Start Date : 01-OCT-03
Project Duration End Date :
Partial ACS : 08024320021RA0..01.N100.HBN1000000C.I.00203.506.99
Legacy Cost Center # : 100
Cost Center label : RESEARCH GRANTS
Process ASAP : Y
Comments :
Customer( for contract remind projects):
Concurrent request Id : 98819
User Id : 1051

An Operating Budget Account does not exist for the Project request you entered.
Please submit an email request for a new Operating Budget Account to the NBRSS
Finance mailbox located in the Microsoft Outlook Global Address List.
-----
End of log messages from PIsSql program
-----
-----
-----
Go To... First Previous Next Last
```

At the bottom right of the page, it says "Page 39".

- If you enter a request for a Project that does not have an Operating Budget Account established, you will receive an error message when you submit your request. This message is displayed in red, with a status of “Error”, as shown.
- If you receive this error message, click on the **View Log** button, and follow the instructions listed at the bottom of the report to request a new Operating Budget Account. Consult your ADI sheet for a list of valid Operating Budget Accounts.

Accessing Previously Submitted Requests



- To view previously submitted requests, click on the **View** pull down menu and select **Requests**.
- When the Find Request window appears, leave the default values, and click on the **Find** button.

Reviewing Submitted Requests

Reviewing Submitted Requests

Request ID	Name	Parent	Phase	Status	Parameters
111478	Financial Statement Gen		Pending	Normal	MAY_03_FY-03, , 1002, 1004, 1011,
111477	Financial Statement Gen		Completed	Normal	MAY_03_FY-03, , 1002, 1004, 1011,
111476	Financial Statement Gen		Completed	Normal	MAY_03_FY-03, , 1040, 1001, 692, U
111451	Financial Statement Gen		Completed	Normal	MAY_03_FY-03, , 1003, 1001, 1011,
111450	Financial Statement Gen		Completed	Normal	MAY_03_FY-03, , 1007, 1002, 1012,
111449	Financial Statement Gen		Completed	Terminated	MAY_03_FY-03, , 1006, 1007, 1017,
111401	Financial Statement Gen		Completed	Normal	MAY_03_FY-03, , 1006, 1007, 1017,
111310	PRC: Transaction Import		Completed	Terminated	VALTRAN,
111309	NIHPA Reset Interface Re		Completed	Normal	
111308	PRC: Transaction Import		Completed	Error	

Buttons: Refresh Data, Find Requests, Submit a New Request..., View Output, View Log...

- The last request you submitted will appear at the top of the request list. A request is selected when the first field of the request is hi-lighted in blue.
- Click on the **View Log** button to open your request.

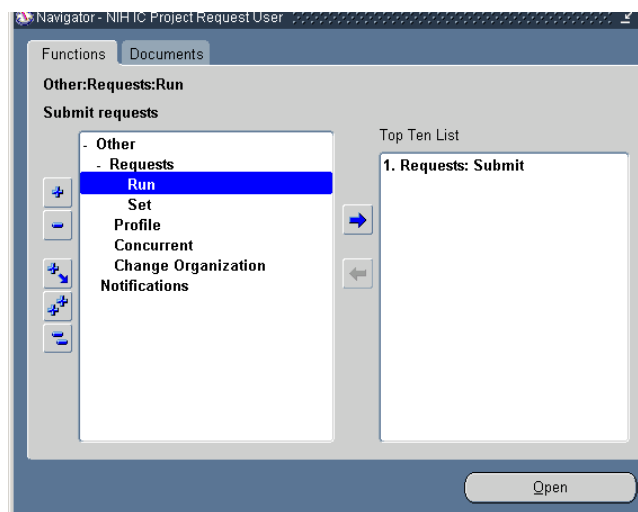
Establishing New Projects

NIH IC Project Request User

N>Other>Requests>Run

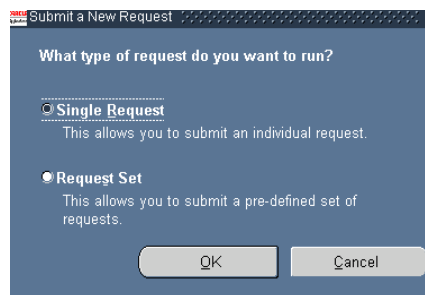
Submit a New Request

1. From the Oracle Navigator, double click on the **Other** function.
2. Double click on the **Requests** Function.
3. Double click on the **Run** function or highlight the **Run** function and click the **OK** button.

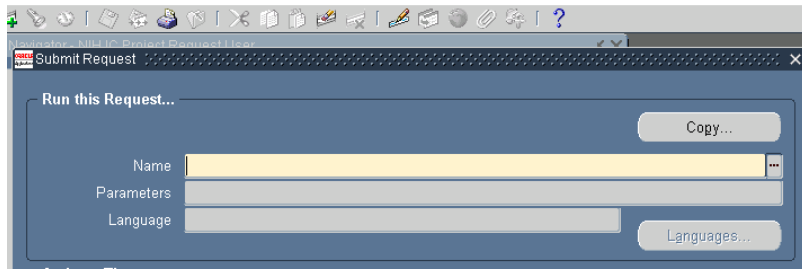


Result: The **Submit a New Request** pop-up window is displayed.

4. Select **Single Request** and click on the **OK** button.

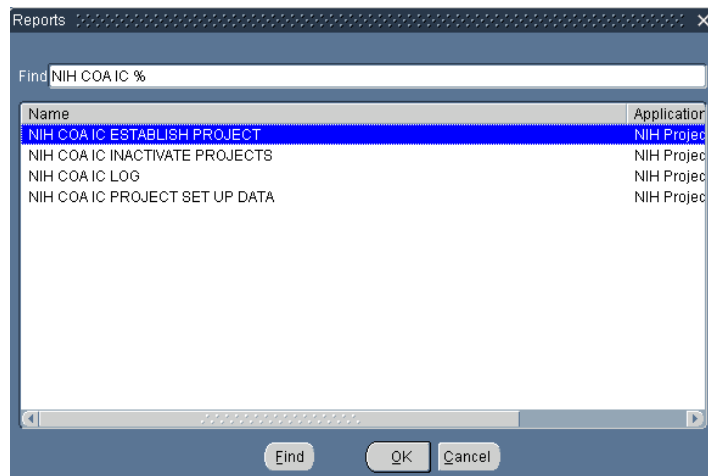


Result: The **Submit Request** window will appear.



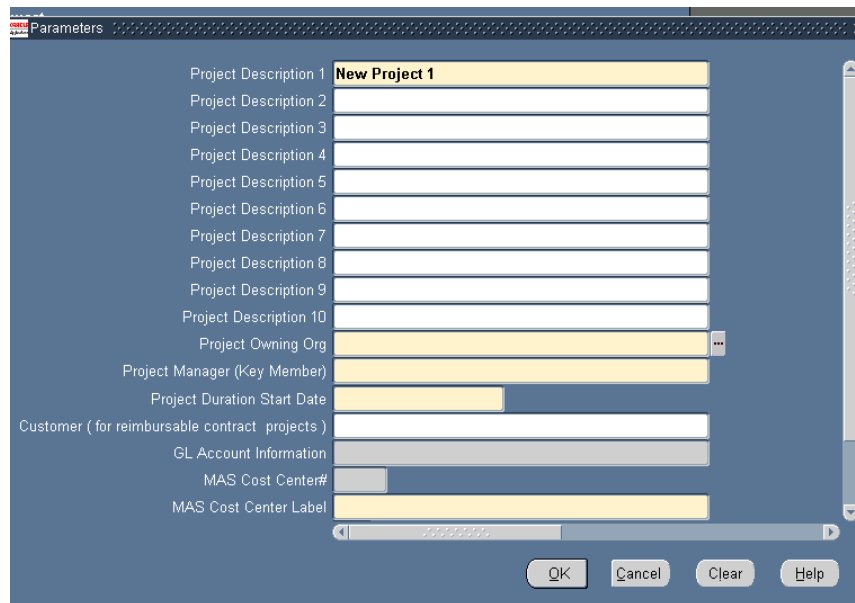
5. In the **Name** field, click on the **List of Values (LOV)** icon.

Result: The List of Values will appear.



6. From the LOV, select the **NIH COA IC ESTABLISH PROJECT** value and click the **OK** button.

Result: The NIH COA IC ESTABLISH PROJECT **Parameters** window will appear.



7. Enter a description for your new project in the Project Description 1 field. You may enter up to nine additional new projects if they are all associated with the same Operating Budget.
8. Click inside the Project Owning Org field, and then click the LOV next to this field.

Result: The LOV for Project Owning Org will appear.

9. Click inside the Find field and type all or part of the SAC related to the org you are assigning, followed by a % as shown, and then click the Find button

Result: All values beginning with HNN1 will appear in the LOV.

10. Select the SAC you want to use for the Project Owning Org and click on the OK button

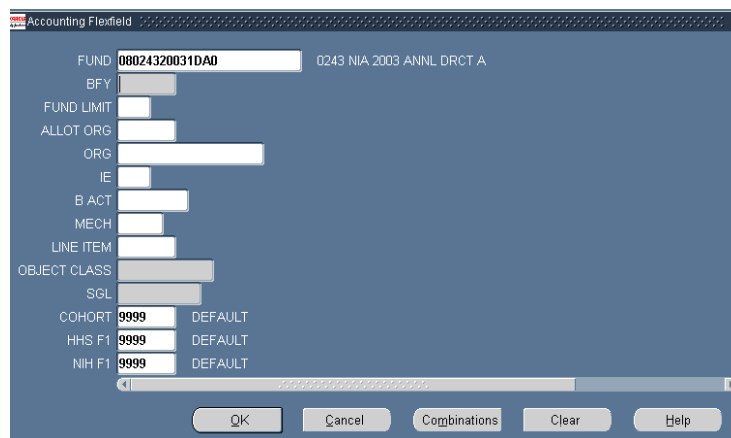
Result: This value will appear in the Project Owning Org field.

11. Complete the following additional fields on the form by using the LOV or typing the values into the fields:

Field	Description
Project Manager	Person who is fiscally responsible for the Project, most likely the Budget Officer. The Project Manager will receive an email notification when the project is complete
Project Duration Start Date	The date the project should be available for obligations
Customer	Direct Projects do not have customers. Reimbursable Projects will in the future. For now, enter "Conversion Customer" for all Reimbursable Projects only.

12. Click inside the **GL Account Information** field

Result: The Accounting Flexfield window will appear, displaying all of the ACS value fields.



The screenshot shows the 'Accounting Flexfield' window with the following fields and values:

FUND	00024320031DA0	0243 NIA 2003 ANNL DRCT A
BFY		
FUND LIMIT		
ALLOT ORG		
ORG		
IE		
B ACT		
MECH		
LINE ITEM		
OBJECT CLASS		
SGL		
COHORT	9999	DEFAULT
HHS F1	9999	DEFAULT
NIH F1	9999	DEFAULT

At the bottom, there are buttons for OK, Cancel, Combinations, Clear, and Help.

13. Complete the following ACS fields:

Field	Description
Fund	14 character code that identifies the OpDiv (NIH), the IMN, the Appropriation Fiscal Year, whether the fund is Direct or Reimbursable and Category A or Category B
Fund Limit	Defines whether the Allotment relates to any special law or program (Small Business, Superfund, etc.)
Allotment Org	Identifies the IC to whom an Allotment is issued
Org	Represents the organizational unit within the IC to whom the Operating Budget is issued
IE	Indicates whether the use of funds is internal by NIH or external by the research community
Budget Activity	Identifies an area of research to which the funds are applied
Mechanism	Identifies the research mechanism to which the funds are applied
Line Item	Catch all segment that uniquely identifies the Operating Budget if all other segment values are the same
Cohort	Not currently used - leave the default of 9999
HHSF1	Not currently used - leave the default of 9999
NIHF1	Not currently used - leave the default of 9999

14. Click the **OK** button when you are finished entering the segment values.

Result: You will return to the NIH COA IC ESTABLISH PROJECT FORM.

15. Enter the MAS Cost Center for the new Project.

16. Leave the default value of "Y" in the Process Immediately field if you want your request to go directly to OFM for process. If you do not want your request to be processed immediately, change the value to "N" for No.

17. Enter any comments for OFM into the Comments field.

18. Leave the Project Duration Close Date field blank

19. Click on the OK button to close the NIH COA IC ESTABLISH PROJECT FORM.

Result: You will return to the Submit Request window.

Submit Request

Run this Request...

Name: NIH COA IC ESTABLISH PROJECT

Parameters: New Project 1: HNN102 NIA OD OEA OFC EXTRAML AFFRS:Rovine, Valerie:10

Language: American English

Copy...

At these Times...

Run the Job: As Soon as Possible

Schedule...

Upon Completion...

☒ Save all Output Files

Notify:

Print to: noprint

Options...

Help (B) Submit Cancel

20. Click on the **Submit** button to submit your new project request.

Result: The Request window will appear, listing your latest request at the top. You may want to make a note of the request number for tracking purposes.

Requests

Refresh Data

Find Requests

Submit a New Request...

Request ID	Name	Parent	Phase	Status	Parameters
111056	NIH COA IC ESTABLISH F		Completed	Normal	New Project 1, , , , , , , 1519, 15
111047	NIH COA IC LOG		Completed	Normal	1571, P, IC LOG, ,
111046	NIH COA IC INACTIVATE		Completed	Normal	15189, 07-MAY-2003, , , , , , ,
111045	NIH COA IC INACTIVATE		Completed	Normal	18993, 07-MAY-2003, , , , , , ,
111044	NIH COA IC INACTIVATE		Completed	Normal	15189, 07-MAY-2003, , , , , , ,
110116	NIH COA IC ESTABLISH F		Completed	Error	Amy's Happy Project, , , , , , , 1

Hold Request

View Details...

View Output

Cancel Request

Diagnostics


View Log...

- Click on the **Refresh Data** button until the Phase value for the request changes to completed.

Result: Your project will be submitted to OFM if you answered "Yes" to Process Immediately. You and the Project Manager will receive an email notification or a notification through Oracle once your new project is established by OFM. If you answered "No" to Process Immediately, you will need to submit your request as a separate step.

End of activity

Deactivating a Project

**nbrss**
NATIONAL INSTITUTES OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM

Deactivating a Project

Lesson 3: Deactivating a Project

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Selecting the NIH COA IC INACTIVATE PROJECTS Form

The screenshot shows a software interface titled "Selecting the NIH COA IC INACTIVATE PROJECTS Form". At the top left, there are logos for the National Institutes of Health (NIH) and the National Business & Research Support System (NBRSS). The main window is titled "Reports" and contains a search bar with the text "Find NIH COA IC %". Below the search bar is a table with two columns: "Name" and "Application". The table lists four items: "NIH COA IC ESTABLISH PROJECT", "NIH COA IC INACTIVATE PROJECTS" (which is highlighted in blue), "NIH COA IC LOG", and "NIH COA IC PROJECT SET UP DATA". At the bottom of the window are three buttons: "Find", "OK", and "Cancel". A red bar at the bottom right of the window contains the text "Page 43".

Name	Application
NIH COA IC ESTABLISH PROJECT	NIH Project
NIH COA IC INACTIVATE PROJECTS	NIH Project
NIH COA IC LOG	NIH Project
NIH COA IC PROJECT SET UP DATA	NIH Project

- You also have the capability within the NBS to inactivate projects (CANs) you are no longer using. A separate form has been created for inactivating projects.
- You will use the Submit Request window to pull up the form used to enter your project inactivation request. This form is called the NIH COA IC INACTIVATE PROJECTS form.

Overview of the Project Inactivation Form

The screenshot shows a 'Parameters' window with the following fields:

- Oracle Proj # (Yellow background)
- Deactivation date (Yellow background)
- Comments (Yellow background)
- Oracle Proj # (White background)
- Deactivation date (White background)
- Comments (White background)
- Oracle Proj # (White background)
- Deactivation date (White background)
- Comments (White background)
- Oracle Proj # (White background)
- Deactivation date (White background)
- Comments (White background)
- Process Immed: ☒ Y Yes

Buttons: OK, Cancel, Clear, Help

- When you select the NIH COA IC INACTIVATE PROJECTS value, the deactivation request form will appear.
- You will use this deactivation request form to identify the Projects you want to deactivate. Remember, all fields with yellow backgrounds are required fields.
- You can forward any comments or special instructions to OFM in the Comments field.
- The Process Immediately field indicates whether OFM should process the deactivation immediately or if the requestor wants to submit the request at a later date. The default value is “Y” (“Yes”) for immediate processing.

Selecting the Project for Inactivation

Selecting the Project for Inactivation

Parameters

Oracle Proj #

Deactivation date

Comments

Oracle Proj #

Deactivation date

Comments

Oracle Proj #

Deactivation date

Comments

Oracle Proj #

Deactivation date

Comments

Process Immed

N

Find 1%

Oracle Proj #	Description
100001	8331753
100002	8331751
100003	8421781
100004	8335594
100005	8425556
100006	8420175
100007	8420257
100008	8429383
100009	8429384
100010	8420177
100011	8420256
100012	8420258
100013	8420179
100014	8426608
100015	8426610
100016	8320201
100017	8320220

Find OK Cancel

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- You must enter at least one Oracle Project #, but may deactivate up to five projects at the same time.
- Use the LOV to locate the Project you want to deactivate.
- You can search on either the Project # or the corresponding CAN. If you would prefer to search on the CAN you will need to use the % sign as a wild card at the beginning of the value.

Entering the Deactivation Date

The screenshot shows a software window titled "Entering the Deactivation Date" with the nbrss logo. The window contains a list of parameters for a project. The first parameter is "Oracle Proj #" with a yellow bar. The second parameter is "Deactivation date" with a white bar, which is highlighted by a red rectangle. The third parameter is "Comments" with a white bar. This pattern repeats for several more parameters. At the bottom, there is a "Process Immed" checkbox with "Y" selected, and buttons for "OK", "Cancel", "Clear", and "Help".

- The Deactivation Date is the last day the Project will be able to incur obligations.
- If you want the deactivation to be immediate, use the current date as the Deactivation Date.
- The Deactivation Date can also be used to identify a future point in time when you want the deactivation to go into effect, such as the end of the fiscal year. In this case, you would enter 30-SEP-2003 as the Deactivation Date, and OFM would process the deactivation to be effective as of that date. This date prevents use in FY 2004.

Completing the Process Immediately Field

The screenshot shows a 'Parameters' dialog box with the following fields:

- Oracle Proj #
- Deactivation date
- Comments
- Oracle Proj #
- Deactivation date
- Comments
- Oracle Proj #
- Deactivation date
- Comments
- Oracle Proj #
- Deactivation date
- Comments
- Oracle Proj #
- Deactivation date
- Comments
- Process Immed **Y** Yes

Buttons: OK, Cancel, Clear, Help

Page 47

- You will also need to fill in the Process Immediately field.
- If you enter “Y” for Yes, the system will automatically forward your request to OFM.
- If you enter “N” for No, your request will go into a “pending” status and will require a separate step to submit the request to OFM.

Submitting Your Deactivation Request

Submitting Your Deactivation Request

Run this Request...

Name: NIH COA IC INACTIVATE PROJECTS

Parameters: 44365:12-NOV-2002:.....N

Language: American English

Copy...

Submit Request

Requests

Request ID	Name	Parent	Phase	Status	Parameters
99545	NIH COA IC INACTIVATE		Completed	Normal	35482, 12-NOV-2002,
99279	NIH COA IC ESTABLISH F		Completed	Normal	New Project 1,, 1519, 22
99278	NIH COA IC ESTABLISH F		Completed	Normal	1211,, 130, 176, 10-OCT-
99277	NIH COA IC ESTABLISH F		Completed	Normal	xxx,, 1519, 227, 10-OCT
99276	NIH COA IC ESTABLISH F		Completed	Normal	New Project 1,, 1519, 22
99268	NIH COA IC LOG		Completed	Normal	1350, S, IC LOG, ,
99267	NIH COA IC LOG		Completed	Normal	1350, S, IC LOG, ,
99185	NIH COA OFM LOG		Completed	Normal	1350, S, OFM LOG, ,
99183	NIH COA OFM LOG		Completed	Normal	1350, S, OFM LOG, ,
99170	NIH COA OFM LOG		Completed	Normal	1350, S, OFM LOG, ,

Hold Request View Details... View Output

Cancel Request Diagnostics View Log...

Submit Cancel

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- Once you have entered all the fields for your deactivation request, you can submit your request by clicking on the **Submit** button.
- If you selected process immediately, your request will go directly to OFM for setup when you click the Submit button.
- If you choose not to process immediately, your request will be placed on a pending status until further review and final submission.
- After you submit your deactivation request, the Requests screen will appear, displaying your request ID and the phase and status of your request.

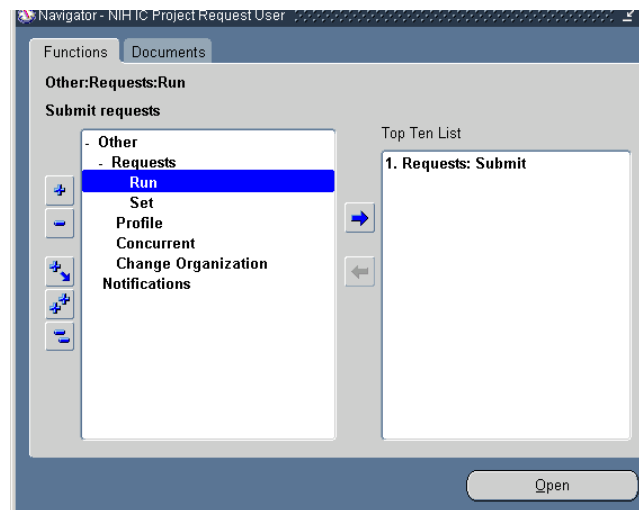
Deactivating Projects

NIH IC Project Request User

N>Other>Requests>Run

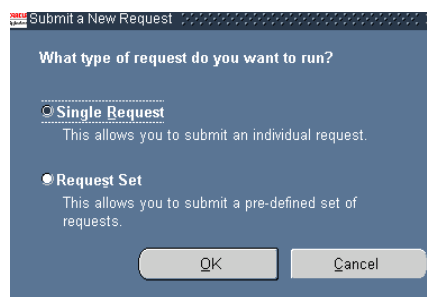
Submit a New Request

1. From the Oracle Navigator, double click on the **Other** function.
2. Double click on the **Requests** Function.
3. Double click on the **Run** function or highlight the **Run** function and click the **OK** button.

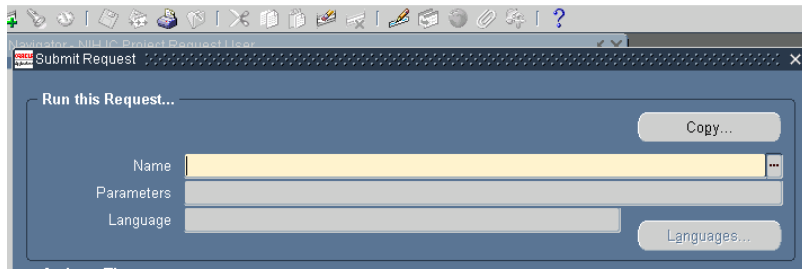


Result: The **Submit a New Request** pop-up window is displayed.

4. Select **Single Request** and click on the **OK** button.

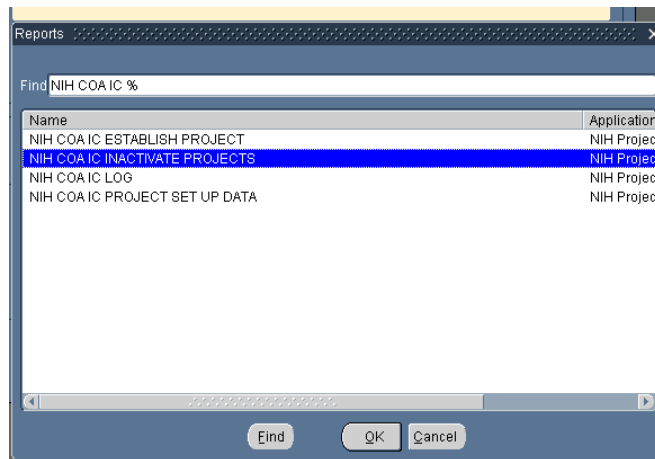


Result: The **Submit Request** window will appear.



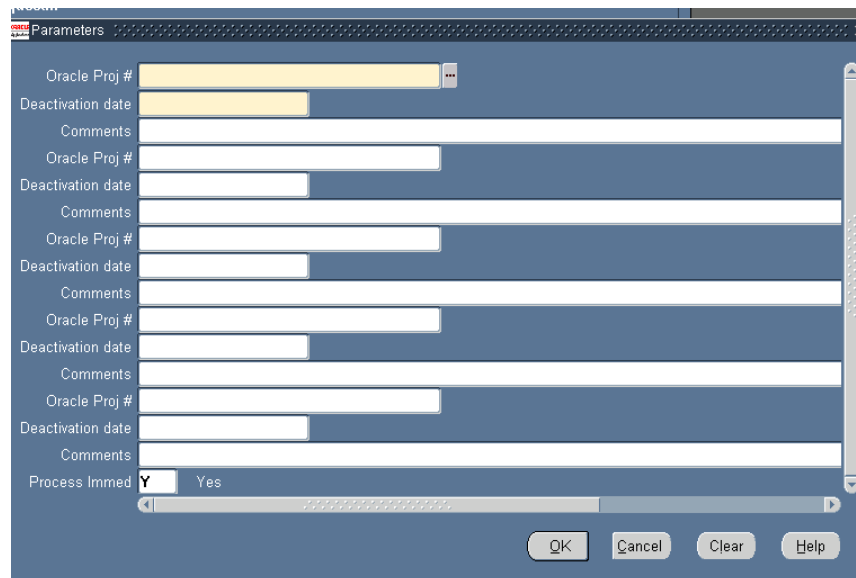
5. In the **Name** field, click on the **List of Values (LOV)** icon.

Result: The Reports LOV will appear.



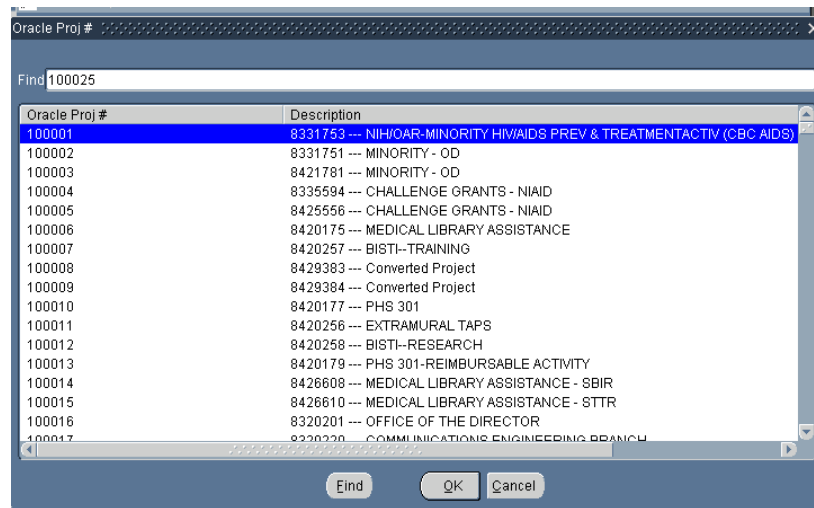
6. From the LOV, select the **NIH COA IC INACTIVATE PROJECTS** value and click the **OK** button

Result: The NIH COA IC INACTIVATE PROJECTS **Parameters** window will appear.



7. Click the LOV next to the Oracle Proj # field

Result: The List of Values displaying Oracle Project #s and Descriptions will appear.

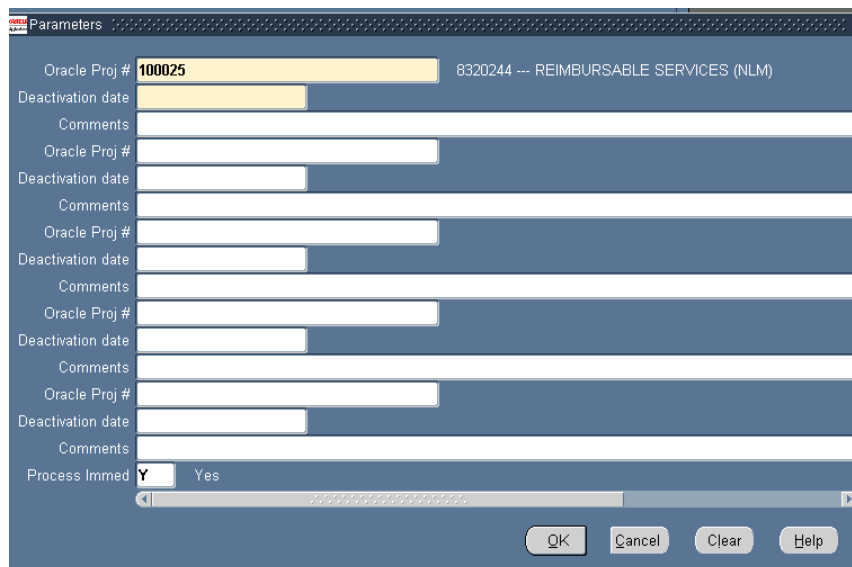


8. In the Project # LOV, you can search by Oracle Project Number, if you know it, or by CAN, which is part of the description.
9. To search by Project #, enter the Project Number into the Find field and then click on the Find button.

Result: The Project Number will appear in the Oracle Proj # field.

10. To search by CAN, enter a % into the Find field, followed by the 7-digit CAN, and then click on the Find button.

Result: The Project Number will appear in the Oracle Proj # field, and the related CAN and description will appear in the label.



- Result: You will return to the Submit Request window.

Submit Request

Run this Request...

Copy...

Name NIH COA IC INACTIVATE PROJECTS

Parameters 100025:07-MAY-2003:.....Y

Language American English

Languages...

At these Times...

Run the Job As Soon as Possible

Schedule...

Upon Completion...

☒ Save all Output Files

Notify

Print to noprint

Options...

Help (H) Submit Cancel


Result: The Request window will appear, listing your latest request at the top. You may want to make a note of the request number for tracking purposes.

[illegible]

- Click on the **Refresh Data** button until the Phase value for the request changes to completed.

Result: Your deactivation request has been submitted to OFM because you answered Yes to Process Immediately.

End of activity

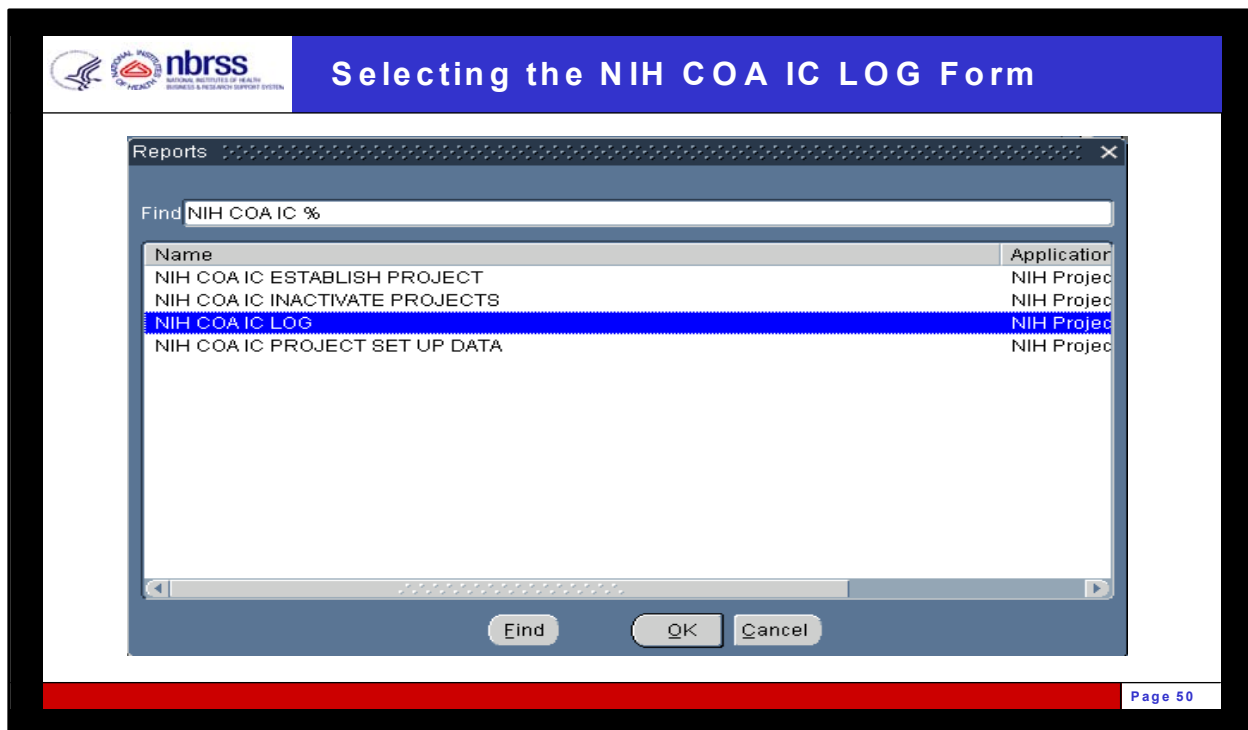
**nbrss**
NATIONAL INSTITUTES OF HEALTH
BIOMEDICAL RESEARCH SUPPORT SYSTEM

Working with the Project Request Log

Lesson 4: Working with the Project Request Log

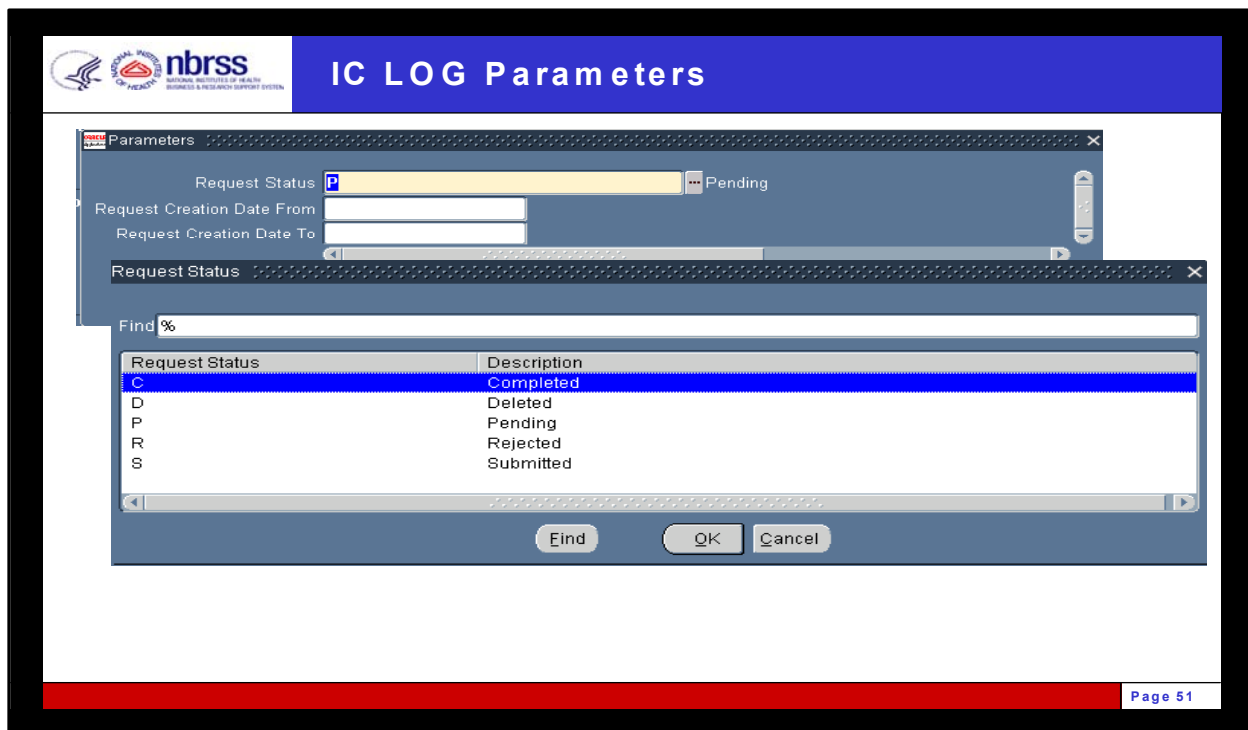
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Selecting the NIH COA IC LOG Form



- Selecting the NIH COA IC LOG option enables you to view the status of all requests you have created using Oracle Projects.
- While running the log is an **optional** step, it can be useful in helping you keep track of all of your project requests.

IC LOG Parameters



- The IC Log Parameters window provides information on request statuses, so you can see exactly where your project is in the request process. You can choose to query on the following statuses:
 - A **Completed** status means that OFM has entered the new Project, so the request is complete.
 - A **Deleted** status means the IC has deleted the request using the IC PROJECT SETUP DATA process.
 - A **Pending** status is assigned to all new project requests and inactivation requests that have not yet been submitted to OFM, and are therefore “pending” submission.
 - The **Rejected** status means that some piece of requested information has caused the project to reject. Corrective action by you is needed.
 - A **Submitted** status means that the project has been submitted to OFM, but OFM has not yet entered the request.

- You can also select a specific date range in which to search for requests.

Querying for Pending Requests

Submit Request

Querying for Pending Requests

Run this Request...

Name: NIH COA IC LOG

Parameters: P::

Language: American English

At these Times...

Run the Job: As Soon as Possible

Upon Completion...

☒ Save all Output Files

Notify:

Print to: noprint

Buttons: Copy..., Languages..., Schedule..., Options..., Help (H), Submit, Cancel

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- After you select the status of the requests you want to see in the log, you can submit your request to view the log by clicking on the **Submit** button.

Opening the Results of Your Request

Report request ID - 111016

Page 2

NIH COA IC LOG - A157SAND Instance

Project Template: N Status: P

Request Id 109073 Operating Budget Exists N Request Status Pending

Project Description new

Project Organization HBN025 NIA IRP LCI LAB CLINICAL INVESTIGATION

Project Manager CUSHING, Mary C Proj.Start Date 10-MAR-03 Proj.End Date

PARTIAL ACS

Fund 08029120031D&O 0291 NHGRI 2003 ANNL DRCT &P

BFY

Fund limit 12 DIABETES

Allot Org B100 NIAMS

GL Org HN27800000C HN278 NINR DIR HPL HEALTH PROMOTION LAB

IE I Internal

Budget Activity 00019 NCI RESOURCE-RSCH MANPOWER DEVELOPMENT

Mechanism U01 GENIERS GENERAL

Line Item 0014 BUILDING 10 PHASE I RENOVATION

MIS Logon Code # 120 TRAINING NATIONAL RESCH SERVICE MANP

Go To... First Previous Next Last

View Output

View Log...

Page 53

- To view the log, click on the **View Output** button at the bottom of the Requests window.
- New Project requests will always appear at the top of the log and deactivation requests will appear at the bottom of the log.
- Use the **First**, **Previous**, **Next** and **Last** buttons to navigate through the report.
- Close the log by clicking on the **Close** box on the upper right side of the report window.

Accessing the NIH IC COA Log

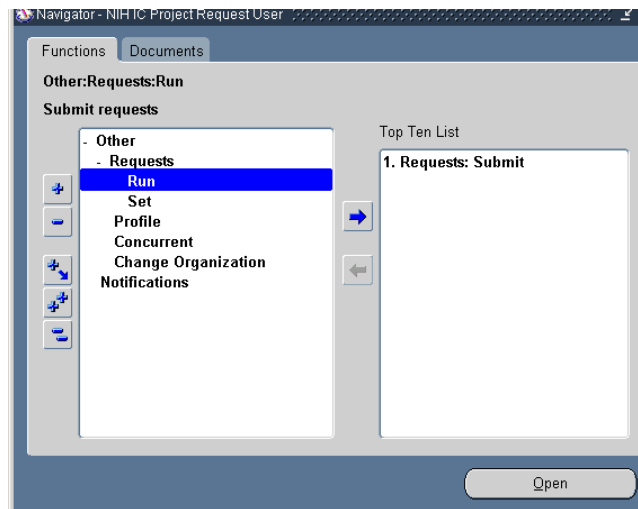
{Insert the appropriate system reference here.}

NIH IC Project Request User

N>Other>Requests>Run

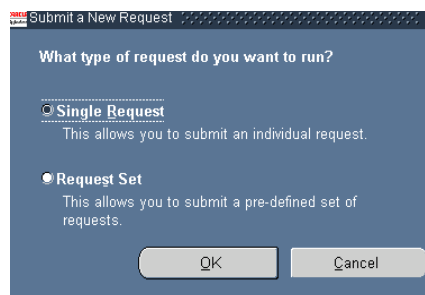
Submit a New Request

1. From the Oracle Navigator, double click on the **Other** function.
2. Double click on the **Requests** Function.
3. Double click on the **Run** function or highlight the **Run** function and click the **OK** button.

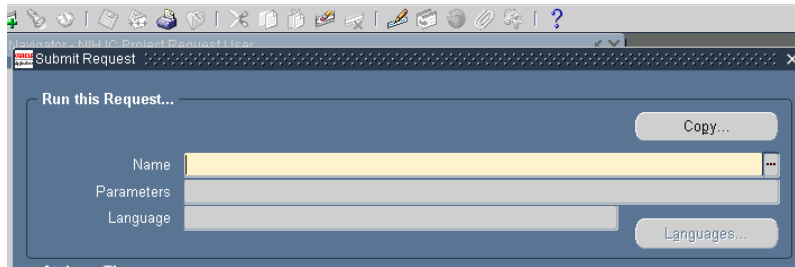


Result: The **Submit a New Request** pop-up window is displayed

4. Select **Single Request** and click on the **OK** button.

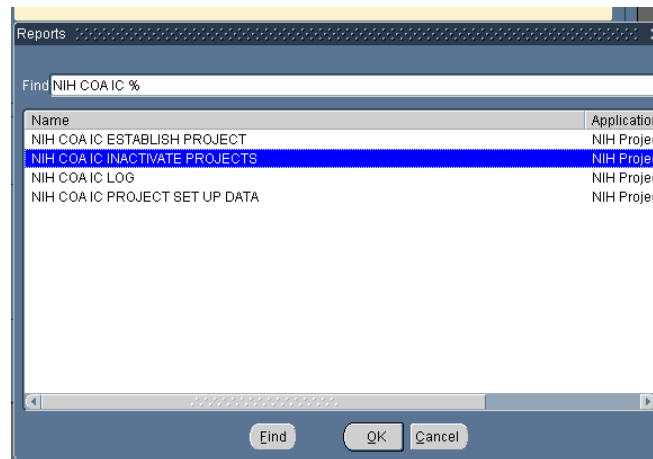


Result: The **Submit Request** window will appear.



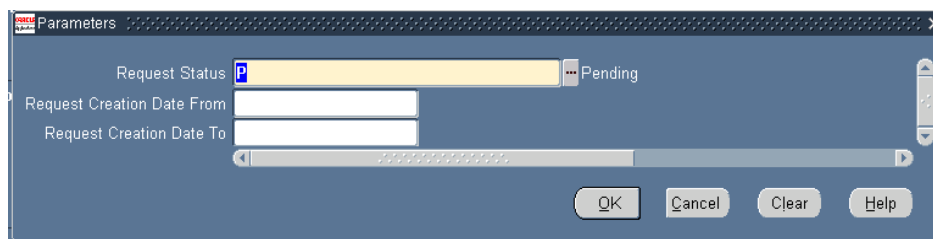
5. In the **Name** field, click on the **List of Values (LOV)** icon.

Result: The List of Values will appear.



6. From the LOV, select the **NIH COA IC Log** value and click the **OK** button.

Result: The NIH COA IC LOG **Parameters** window will appear.



7. Leave the default value of P for Pending in the Request Status field.
8. Enter the Request Creation Date From and the Request Creation Date To if desired, or leave blank.
9. Click on the **OK** button.

Result: You will return to the Submit Request window.

Submit Request

Run this Request...

Name **NIH COA IC LOG** Copy...

Parameters **P::**

Language **American English** Language...

At these Times...

Run the Job **As Soon as Possible** Schedule...

Upon Completion...

☒ Save all Output Files

Notify Options...

Print to **noprint**

Help (?) Submit Cancel

12. Click on the **Submit** button to submit your new project request.

Result: The Request window will appear, listing your latest request at the top. You may want to make a note of the request number for tracking purposes.

Requests					
<button>Refresh Data</button>		<button>Find Requests</button>		<button>Submit a New Request...</button>	
Request ID	Name	Parent	Phase	Status	Parameters
99552	NIH COA IC LOG		Completed	Normal	1350, P, IC LOG,,
99551	NIH COA IC LOG		Completed	Normal	1350, P, IC LOG,,
99550	NIH COA IC PROJECT SE		Completed	Normal	Submitted, Selected, 99548
99549	NIH COA IC LOG		Completed	Normal	1350, P, IC LOG,,
99548	NIH COA IC INACTIVATE		Completed	Normal	35495, 24-NOV-2002, ,,,,,,,,,,
99547	NIH COA IC LOG		Completed	Normal	1350, P, IC LOG,,
99546	NIH COA IC PROJECT SE		Completed	Normal	Submitted, All,
99545	NIH COA IC INACTIVATE		Completed	Normal	35482, 12-NOV-2002, ,,,,,,,,,,
99279	NIH COA IC ESTABLISH F		Completed	Normal	New Project 1, ,,,,,,,, 1519, 22
99278	NIH COA IC ESTABLISH F		Completed	Normal	1211, ,,,,,,,, 130, 176, 10-OCT-

Page 1 of 1
Total Rows = 12

Hold Request
View Details..
View Output

Cancel Request
Diagnostics
View Log..

- Click on the **Refresh Data** button until the Phase value for the request changes to completed.
- Click on the View Output button to view the request log.

Result: The log will be appear, displaying all of your pending requests.

Report request ID - 111047

Page 2 Font Size 10

06-MAY-03 02:06 PM NIH COA IC LOG - A157SAND I

Project Template: N Status : P


Request Id	Status	Project Num	Project Name	Project End Date	Request Creation Date
111045	Pending	103829	8423154	07-MAY-03	06-MAY-2003

Go To... First Previous Next Last

- Click the **Last** button to move to the bottom of the report, where deactivation requests are displayed.

End of activity

Submitting or Deleting Pending Requests



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Submitting or Deleting Pending Requests

Lesson 5: Submitting or Deleting Pending Requests

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Selecting the NIH COA IC PROJECT SET UP DATA Form

Reports

Find NIH COA IC %

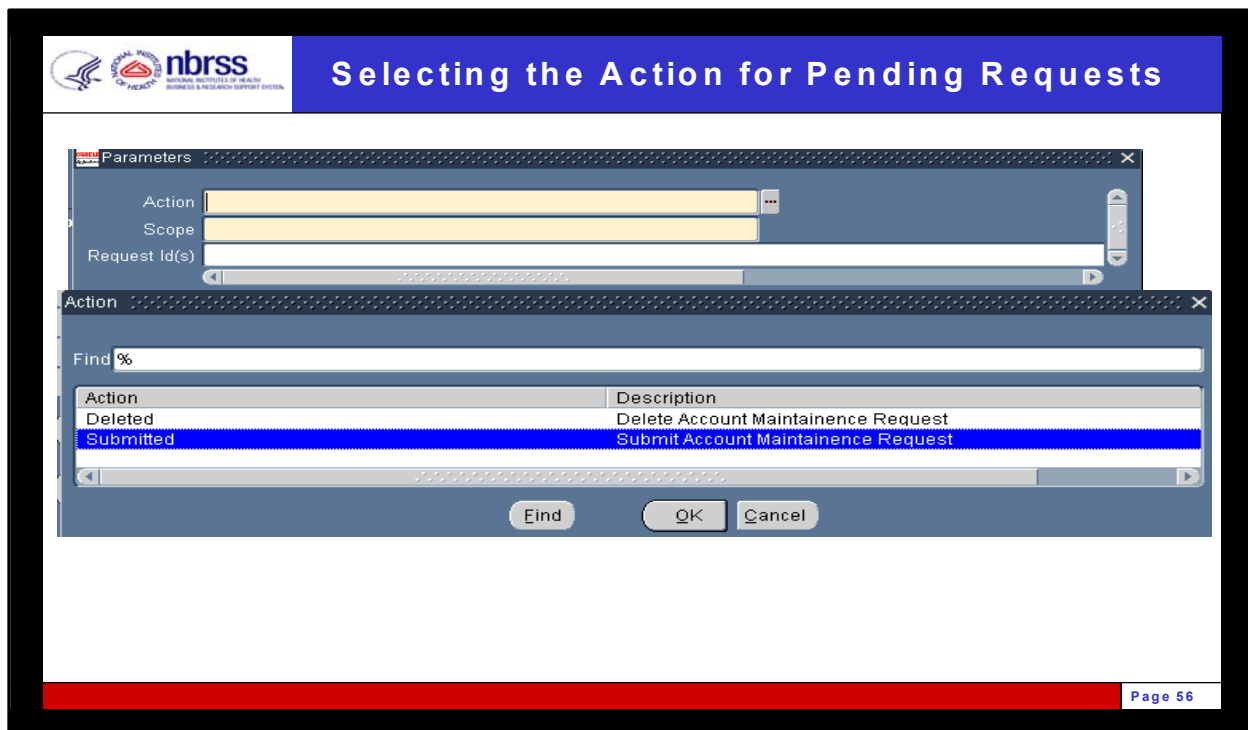
Name	Application
NIH COA IC ESTABLISH PROJECT	NIH Project
NIH COA IC INACTIVATE PROJECTS	NIH Project
NIH COA IC LOG	NIH Project
NIH COA IC PROJECT SET UP DATA	NIH Project

End OK Cancel

Page 55

- If you have any pending new project or deactivation requests, you will use the NIH COA IC PROJECT SET UP DATA form to either submit or delete these requests. You will have pending requests if you overrode the “Process Immediately” option in the Project Request or Deactivation Request forms.

Selecting the Action for Pending Requests



- You will need to select the action you want to take with your pending requests. You have two choices of Actions to take:
- Select “Submitted” if you want to forward the request to OFM.
- Select “Deleted” if you want to delete the pending request.

Selecting the Scope of Requests to be Submitted

The screenshot shows a web application interface for submitting account maintenance requests. At the top, there is a header with the NBRSS logo and the title "Selecting the Scope of Requests to be Submitted". Below this, a "Parameters" dialog box is displayed. The dialog has two tabs: "Parameters" and "Scope". The "Parameters" tab is active, showing "Action" set to "Submitted" and "Scope" set to "All". The "Scope" dropdown is open, showing two options: "All" (All requests) and "Selected" (Enter request ids separated by ,). The "Find" field is empty. At the bottom of the dialog are buttons for "Find", "OK", and "Cancel".

- You will also need to select the Scope of the requests you would like to submit.
- Select "All" to take action on all pending requests.
- Select "Selected" if you would only like to take action on certain pending requests. When the scope field is populated with "Selected" a request number must be designated.

[illegible]

- ## Account Requests

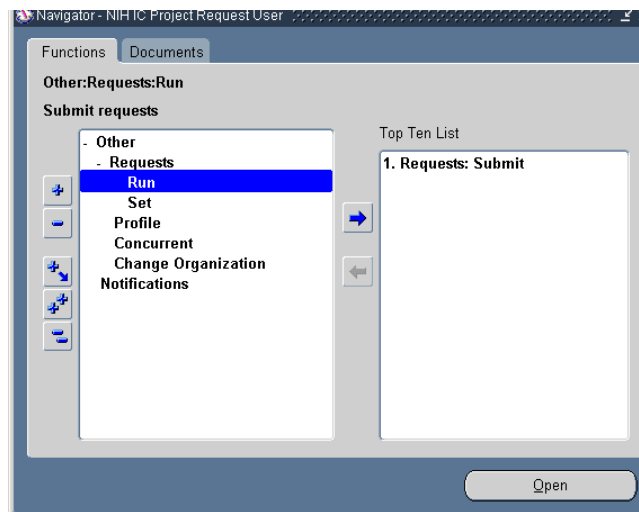
Accessing the NIH COA IC Project Setup Form

NIH IC Project Request User

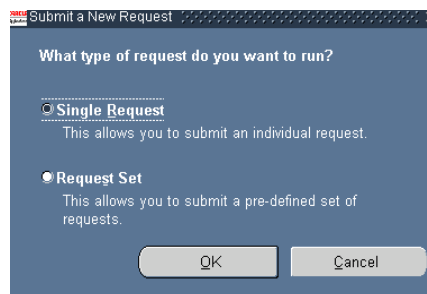
N>Other>Requests>Run

Submit a New Request

1. From the Oracle Navigator, double click on the **Other** function.
2. Double click on the **Requests** Function.
3. Double click on the **Run** function or highlight the **Run** function and click the **OK** button.

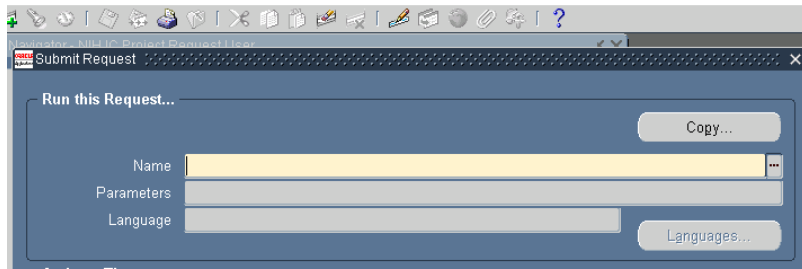


Result: The **Submit a New Request** pop-up window is displayed.



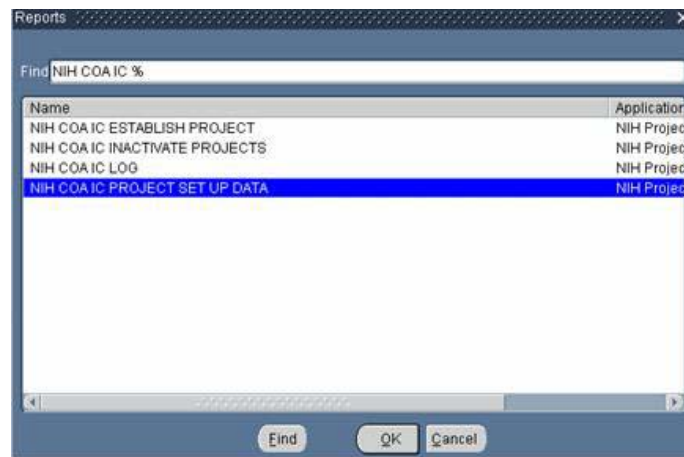
4. Select **Single Request** and click on the **OK** button.

Result: The **Submit Request** window will appear.



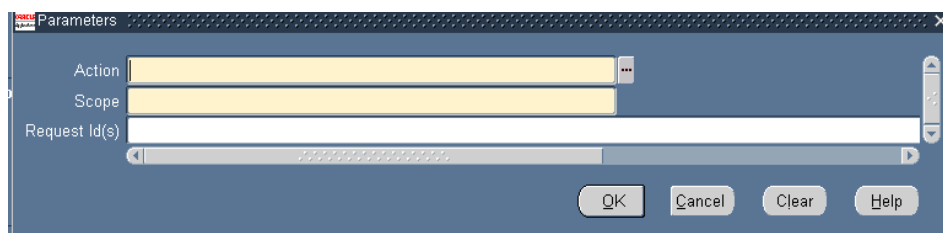
5. In the **Name** field, click on the **List of Values (LOV)** icon.

Result: The List of Values will appear.

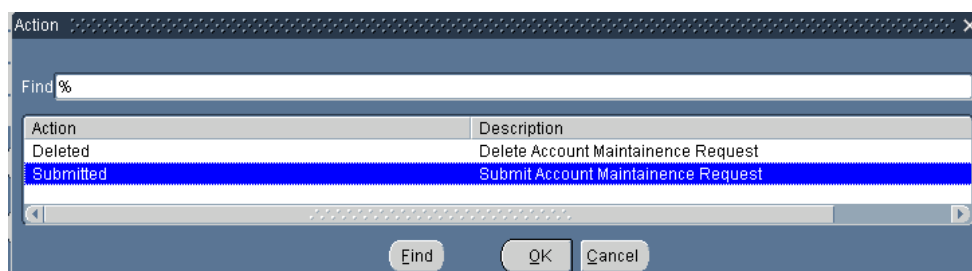


6. From the LOV, select the **NIH COA IC PROJECT SETUP DATA** value and click the **OK** button.

Result: The NIH COA IC PROJECT SETUP DATA **Parameters** window will appear.

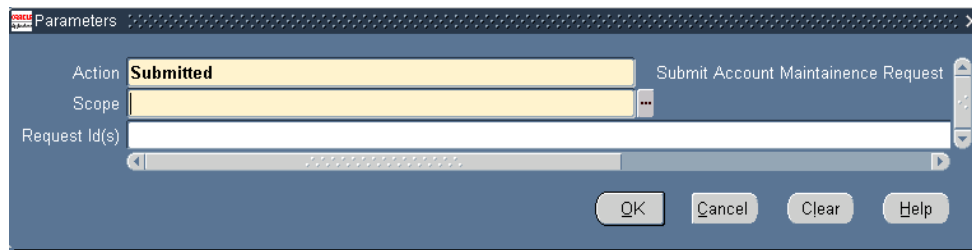


7. Click on the LOV for the Action field.



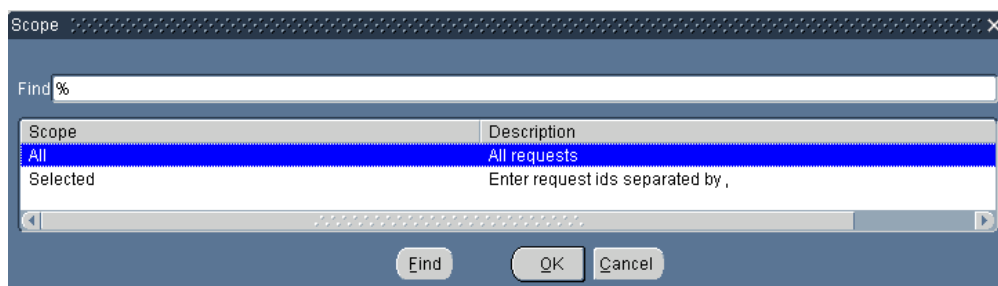
8. Select **Submitted** from the LOV if you want to submit the pending requests, or select **Deleted** from the LOV if you want to delete the pending requests.

Result: The value you selected will appear in the Action field.



The Parameters dialog box is shown. It has a title bar with a close button. Inside, there are three fields: 'Action' with a dropdown menu showing 'Submitted', 'Scope' with a dropdown menu showing '...', and 'Request Id(s)' with a text input field. To the right of the 'Action' field is a label 'Submit Account Maintenance Request'. At the bottom right, there are four buttons: 'OK', 'Cancel', 'Clear', and 'Help'.

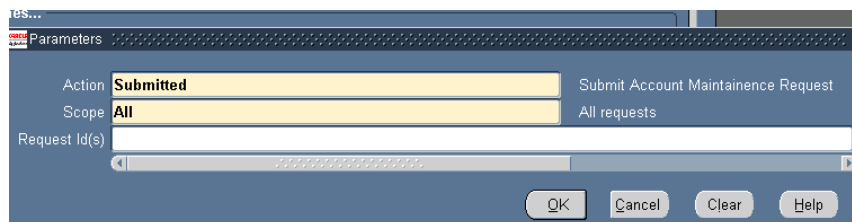
9. Click on the LOV for the Scope field.



The Scope dialog box is shown. It has a title bar with a close button. Inside, there is a 'Find %' search field. Below it is a table with two columns: 'Scope' and 'Description'. The table has three rows: 'All' (highlighted in blue), 'Selected', and 'Enter request ids separated by ,'. At the bottom, there are three buttons: 'Find', 'OK', and 'Cancel'.

Scope	Description
All	All requests
Selected	Enter request ids separated by ,

10. Select **All** to submit all pending requests, or choose **Selected** to submit only those requests you select.



The Parameters dialog box is shown again. The 'Scope' dropdown menu now shows 'All' instead of '...'. The 'Request Id(s)' field is still empty. The 'Action' field remains 'Submitted'. The buttons at the bottom are 'OK', 'Cancel', 'Clear', and 'Help'.

11. If you chose Selected, you will need to enter the specific Request Ids you want to submit in the Request Ids field.

12. When you have finished completing the Parameters screen, click on the OK button.

Result: you will return to the Submit Request window.

Submit Request

Run this Request...

Name

NIH COA IC PROJECT SET UP DATA

Parameters

Submitted:All:

Language

American English

Copy...

At these Times...

Run the Job

As Soon as Possible

Schedule...

Upon Completion...

☒ Save all Output Files

Notify

Print to

noprint

Options...

Help (E)

Submit

Cancel

13. Click on the **Submit** button to submit your new project request.

Result: The Request window will appear, listing your latest request at the top. You may want to make a note of the request number for tracking purposes.

Requests

Refresh Data Find Requests Submit a New Request...

Request ID	Name	Parent	Phase	Status	Parameters
99555	NIH COA IC PROJECT SE		Completed	Normal	Submitted, All,
99554	NIH COA IC LOG		Completed	Normal	1350, P, IC LOG, ,
99553	NIH COA IC INACTIVATE		Completed	Normal	35482, 12-NOV-2002,,
99552	NIH COA IC LOG		Completed	Normal	1350, P, IC LOG, ,
99551	NIH COA IC LOG		Completed	Normal	1350, P, IC LOG, ,
99550	NIH COA IC PROJECT SE		Completed	Normal	Submitted, Selected, 99548
99549	NIH COA IC LOG		Completed	Normal	1350, P, IC LOG, ,
99548	NIH COA IC INACTIVATE		Completed	Normal	35495, 24-NOV-2002,,
99547	NIH COA IC LOG		Completed	Normal	1350, P, IC LOG, ,
99546	NIH COA IC PROJECT SE		Completed	Normal	Submitted, All,

Hold Request View Details... View Output

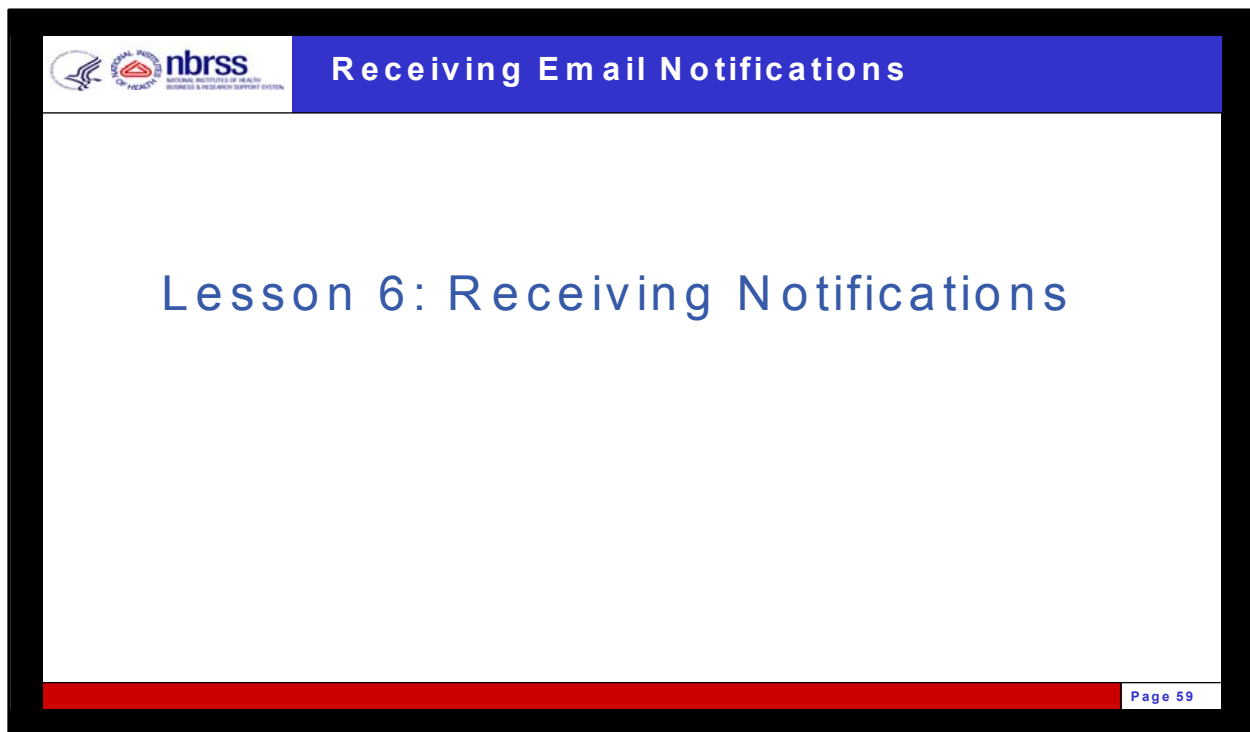
Cancel Request Diagnostics View Log...

14. Click on the **Refresh Data** button until the Phase value for the request changes to completed.



Result: Your pending request has been submitted to OFM.

End of activity

Receiving Email Notifications



The slide features a blue header bar with the text "Receiving Email Notifications" in white. On the left side of the header, there are three logos: the Department of Health logo, the National Institutes of Health logo, and the NBRSS logo. The main body of the slide is white and contains the text "Lesson 6: Receiving Notifications" in blue. At the bottom right, a red bar contains the text "Page 59" in white.

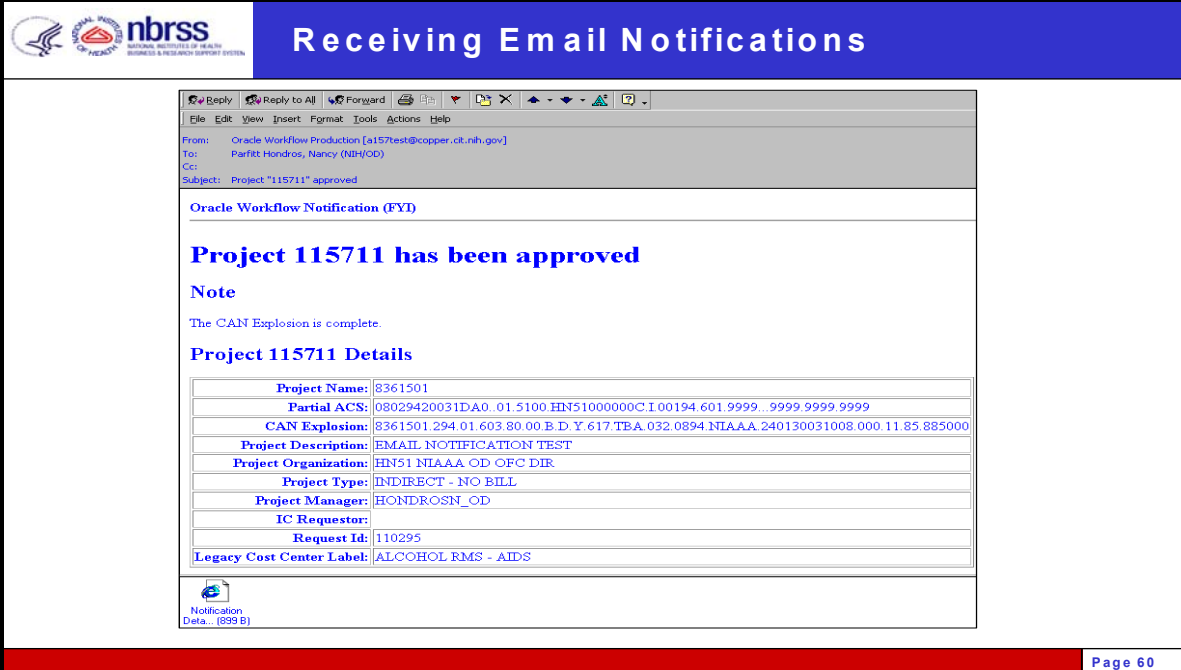
  **nbrss**
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Receiving Email Notifications

Lesson 6: Receiving Notifications

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Receiving Email Notifications



Receiving Email Notifications

From: Oracle Workflow Production [a157test@copper.cit.nih.gov]
To: Parfitt Hondros, Nancy (NIH/OD)
Cc:
Subject: Project "115711" approved

Oracle Workflow Notification (FYI)

Project 115711 has been approved

Note

The CAN Explosion is complete.

Project 115711 Details

Project Name:	8361501
Partial ACS:	08029420031DA0.01.5100.HN51000000C.I00194.601.9999...9999.9999.9999
CAN Explosion:	8361501.294.01.603.80.00.B.D.Y.617.TBA.032.0894.NIAAA.240130031008.000.11.85.885000
Project Description:	EMAIL NOTIFICATION TEST
Project Organization:	HN51 NIAAA OD OFC DIR
Project Type:	INDIRECT - NO BILL
Project Manager:	HONDROSN_OD
IC Requestor:	
Request ID:	110295
Legacy Cost Center Label:	ALCOHOL RMS - AIDS

Notification
Data... (899 B)

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- Once OFM establishes a Project, the Project Manager and the Requestor will receive a notification that the new Project has been created and approved.
- If your email address in the NIH Enterprise Directory (NED) is correct, the notification will be emailed to this address automatically.
- If you do not know how to verify your email address with NED, you can contact the CIT Technical Assistance Support Center on 4-6248 or email them at <mailto:tasc@nih.gov>.
- It is not necessary to click on the attached notification icon. This is required by the system to close the notification and generate the email. It will tell you there is an error. **IGNORE this message!**
- Requestors may receive an additional email notification when OFM completes the NIH COA OFM Project Setup step.

Pulling Up Oracle Notifications

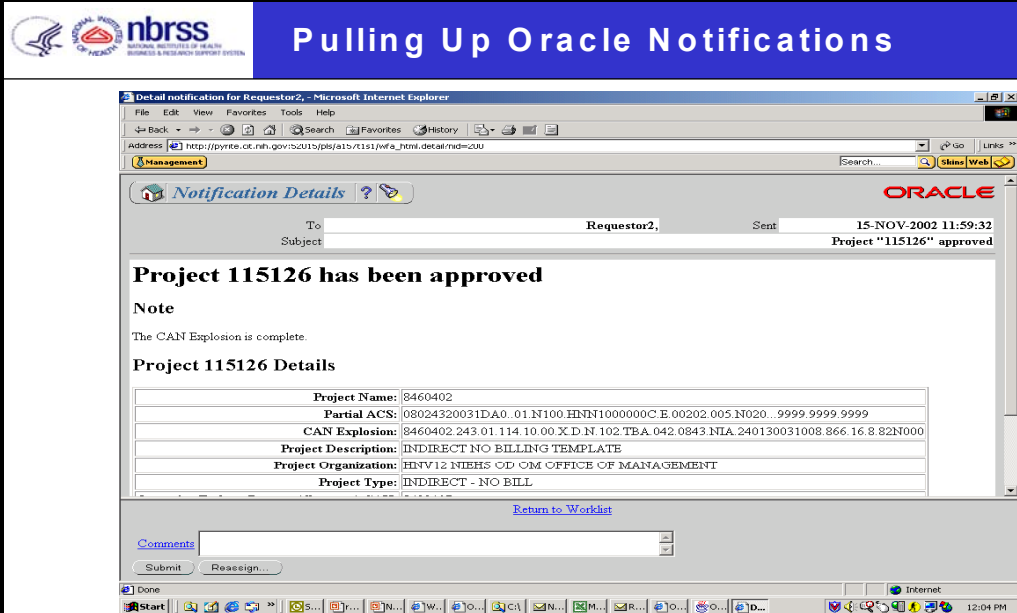
The screenshot displays the NIH IC Project Request User interface. At the top, there is a blue header with the text "Pulling Up Oracle Notifications". Below this, the interface is divided into sections. On the left, under "Functions", the "Notifications" function is selected. In the center, there is a "Workflow Notifications" section with a "Top Ten List" and a "Notifications" button. On the right, there is a "Worklist - Requestor2 - Microsoft Internet Explorer" window. This window shows a table of notifications with the following data:

Select	Priority	Type	From	Subject	Sent	Due
<input type="checkbox"/>		NIHPA Project Approval		Project "115126" approved	15-NOV-2002	

Below the table are "Close" and "Reassign..." buttons. The Oracle logo is visible in the top right corner of the worklist window. The page number "Page 61" is displayed in the bottom right corner.

- If NED does not contain your correct email address, you will need to access notifications through Oracle.
- Click on the Notifications function and click on the **Open** button or double click on the Notifications function.
- Click on the link of the project notification you would like to view.

Pulling Up Oracle Notifications



Detail notification for Requestor2 - Microsoft Internet Explorer

Address: http://pyrite.ct.nh.gov:2015/pls/a15/r151/wfa_html_detail.mad=du

Notification Details **ORACLE**

To: Requestor2, Sent: 15-NOV-2002 11:59:32
Subject: Project "115126" approved

Project 115126 has been approved

Note
The CAN Explosion is complete.

Project 115126 Details

Project Name:	8460402
Partial ACS:	08024320031DA0.01.N100.HNN1000000C.E.00202.005.N020...9999.9999.9999
CAN Explosion:	8460402.243.01.114.10.00.X.D.N.102.TBA.042.0843.NLA.240130031008.866.16.8.82.N000
Project Description:	INDIRECT NO BILLING TEMPLATE
Project Organization:	HNVI12 NIEHS OD OM OFFICE OF MANAGEMENT
Project Type:	INDIRECT - NO BILL

[Return to Worklist](#)

[Comments](#)

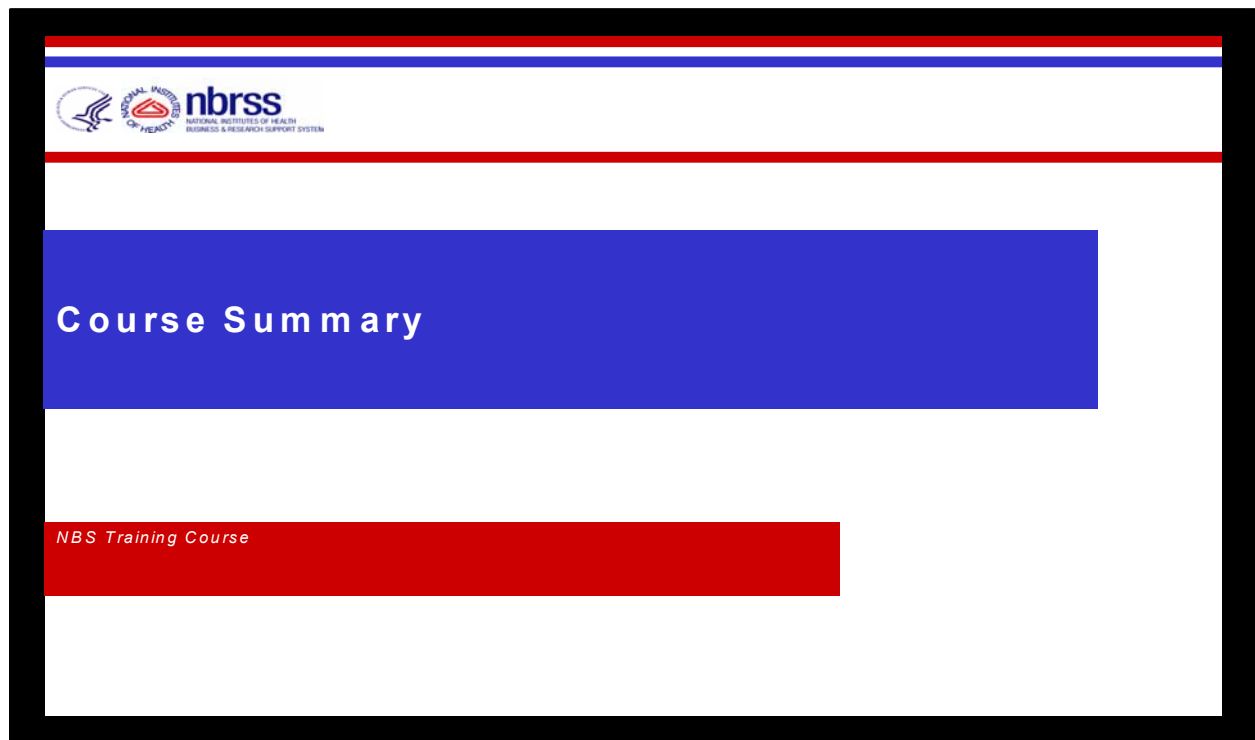
Page 62

- The Requestor and Project Manager will see the notification details

Course Summary

Chapter 4

Course Summary



Course Summary



Course Summary

Major tasks for IC Budget Staff/NBS Team/OFM to perform:

IC Budget Staff

- Establish Operating Budget (MAS Allowance) accounts with the NBS Team
- Create and submit electronic requests for new Cost Centers and Projects

NBS Team

- Establish Operating Budget (MAS) Accounts for IC Budget Offices
- Verify Line Item requests are necessary and enter values into the NBS
- Maintain the ACS list of values for each segment, except for Line Item, so budgetary accounts and their Projects can be automatically created

OFM

- Establish Projects and Costs Centers as requested by the NIH Budget Offices

Page 1

Course Summary



Course Summary

▪ Chart of Accounts Theory

- The new ACS replaces the MAS as NIH's Chart of Accounts. These two structures will be jointly maintained as long as CAN-based systems exist at NIH.
- Budgetary information resides in the NBS General Ledger and Fed Admin, while more detailed expense tracking at the legacy Cost Center/CAN level is performed in Oracle Projects.
- New segment values will be entered and maintained by the NBS Management Center based upon direction from the community, the Department and OB, as appropriate.
- Operating Budget Accounts must exist in the NBS before a new Project request can be made for that specific Operating Budget Account.

Page 2

Course Summary



Course Summary

- Requesting New Projects

- ICs will request new Projects using an NBS Form.
- The Account Requestor will enter detailed information about the project, including the ACS segment values that define the Operating Budget Account for the new Project.
- ICs will also request Project inactivations using a second NBS form.
- The Account Requestor has the ability to submit the request to OFM for immediate processing, or place the request in a “pending” status for future submission to OFM.
- The Account Requestor can choose to notify other individuals that a request has been made.
- The NIH COA IC Log form provide a report on the status of all IC Project requests.

Page 3

